

Campground Master

Software Manual

Campground Master (tm) - Database: Main Operator: Administrator

File Reservations Customers Transactions Reports Maintenance View Log In/Out Help

Available only From: < 2/ 5/2003 > To: < 2/ 5/2003 > Reset / Today Show Range All Site Types

Rack	Arrivals	Departures	On Site	Unassigned	Non-Reserved	Payments Due	Transactions
1	RVDx	Jones	Jones	Jones	Jones	Jones	Jones
2	RVDx	Alton	Alton	Alton	Alton	Alton	Alton
3	RVDx		Yeoman	Yeoman	Yeoman	Yeoman	Yeoman
4	RV	Smith	Smith	Smith	Smith	Smith	Smith
5	RV						
6	RV	Harvey	Harvey	Harvey	Harvey	Harvey	Harvey
7	RV	Johnson	Johnson	Johnson			
8	RV	Childs	Childs	Childs	Childs	Childs	Childs
9	RV			Chrysler	Chrysler	Chrysler	Chrysler
10	RV						
Cbn 1	Cabn			Weeks	Weeks		
Cbn 2	Cabn						
Cbn 3	Cabn						
Boat 1	Boat			Weeks	Weeks		
Boat 2	Boat						
Banq	Hall						
Crafts	Hall				Chrysler	Chrysler	Chrysler
Stor 1	Stor			Chrysler	Chrysler	Chrysler	Chrysler
Stor 2	Stor						
Stor 3	Stor	Childs	Childs	Childs	Childs	Childs	Childs

For Help, press F1 NUM

Campground Master™

User Manual and Reference

by Cottonwood Software

Version 2.0 - April, 2003

Campground Master v2.0

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1 Introduction

Overview - Software Purpose

The Campground Master software was designed to simplify the task of reservation management for any campground or RV resort. It can be extended to include rental cabins, park models and other rooms as needed. In fact it can be used to keep track of anything for which you need to make reservations. It was designed to be fast and easy to use for both large and small campgrounds, while supporting all of the features expected in a reservation management system. It will make the transition from paper-based reservations to a computerized system as quick and painless as possible.

In addition to keeping track of reservations (including the current and past status of all rental sites), the software keeps a detailed customer database and a complete log of all financial transactions for each customer and rental site. The information can be used to generate helpful financial reports and occupancy reports, show marketing results (where your customers come from), and more.

Setup and Customization

Many aspects of the software are user-definable, and everything can be set up by the end user through the program's simple menu interface. No knowledge of programming is necessary, although a familiarity with the Windows operating system and basic software use is recommended. This manual covers every function of the software, including the maintenance functions used for setting up the database for your particular campground. Most of our customers have found that they can set everything up themselves with a minimal of support required (this is why we offer free support -- it's so seldom needed!)

For more information, see the section *Setting Up Your Campground Database*.

If necessary, you can have Cottonwood Software or one of our representatives set up the initial database for you, so you can get started using the software in a short time with minimal training. If necessary, we can customize the software to handle special functions or create special reports as needed. Contact us for further details.

If You Need Assistance

When you purchase Campground Master, you are entitled to free support via E-mail or phone for at least 1 year. If you are just trying out the software, feel free to contact us with any questions and for licensing details. You can contact Cottonwood Software at:

E-mail: support@campground-master.com

Web: <http://www.campground-master.com>

Phone:

1 (877) 414-8384 (Voice-mail, we will call you back)

1 (913) 522-0717 (Cell phone, for urgent support or order inquiries only please)

Post:

Cottonwood Software
231 Rainbow Dr., #13166
Livingston, TX 77399-2031

2 Getting Started

Overview - Using This Manual

The information in this manual varies from the very basic to the highly complex. If you are not comfortable with using Windows software, you should start by going through the Quick Start guide with the software, and then read the *Terminology* and *Helpful Hints* sections thoroughly before proceeding. You may also want to skip the *Setting Up...* and *Program Options...* sections and start at *The Dynamic Interactive Report Screens* section for more basic program information.

If you are a seasoned Windows user, you can probably skim these sections and dig right in to the *Setting Up Your Campground Database* section. The Quick Start guide is still recommended as a quick introduction to how the software works, however.

The sections of this manual have been generally organized in order from the most basic to the most complex, so that you can get started quickly by learning the most common functions of the software and gradually explore in more depth as needed. Likewise, topics within a section are arranged this way to provide a natural progression into the details of the customer database, for instance. Hopefully every step will be an easy one, and you will soon be an expert.

The exceptions to this easy-to-complex order are the *Setting Up Your Campground Database* and the *Program Options and Settings* sections, which come first. These have been placed before the other sections simply because setup must be done before you can use the software to make reservations. Even so, those section are more of an overview of what is needed to do the setup, since in many cases **you** won't be doing the setup anyway (assuming you have someone else to do the setup). Whoever actually does the setup will need to refer to the *Maintenance* sections which appear later, so you might want to read the setup sections anyway to gain a better understanding of how things are put together. This will help you understand why things look the way they do, and why the software might look or operate slightly different on your computer than the examples given here.

It is highly recommended that you have the software running on your computer and actually use it as you read this manual. You can then experiment with the functions as they are described. This is the fastest way to learn the software. Once you actually do it yourself, you will remember it much better than just having read about it.

WARNING - You will probably **not** want to use the real database for experimenting -- either use the sample database that comes with the software, or make sure you have a *backup* before making any changes, and know how to do a *restore* from the backup once you are finished experimenting.

Terminology

This manual assumes that you are familiar with general computer and Windows terminology, such as keyboard, mouse, window, button, menu, and so forth. Here are a few terms specific to the Campground Master software that are used extensively in the manual.

Tabs -- Besides the Tab key on the keyboard, "Tabs" refers to the row of buttons on the main Campground Master screen that simulate section tabs in a notebook or day-planner. They bear the words "Rack", "Arrivals", "Departures", etc., and are used to change to different views, or dynamic interactive reports (for example, click on the "Payments Due" tab to see the Payments Due view).

Views or **Tab Views**-- Officially known as *Dynamic Interactive Reports* in Campground Master, the different sets of data that appear on the main screen corresponding to the Tabs (see above) are called Views throughout the manual, for simplicity. For example, the *Rack View* is the primary screen with the reservation "rack" dynamic interactive report.

Grids and **Cells** -- Each of the Views consist primarily of a Grid with data Cells. In other words, a grid consists of rows and columns of information, and a cell is any one of the row/column positions. While some data cells may be different sizes to accommodate the data, any structure with rows and columns is considered a grid. These will also appear on some dialogs and report screens. A grid is usually easy to identify since the grid lines are visible, but the lines can be turned off on some views if preferred.

Dialog -- This is a general Windows term, but not commonly used except by programmers. A dialog is any of the pop-up windows that appear to alert the user or ask for input, such as an "Are You Sure" prompt or a customer entry form.

Prompt -- This is a more specific term for a simple dialog that has a message or a question to be answered, and usually a few buttons such as OK, Cancel, Yes, or No. These are usually warnings that the user should read carefully before continuing.

Right-click -- This is a term for clicking the right mouse button (instead of the left button which is more commonly used).

Double-click -- This means click the left mouse button twice in quick succession. It's important to not move the mouse at all between the clicks, or else it will be seen as two separate clicks instead of one double-click action, and the results will be different. (This is a common problem among beginning computer users that takes quite a bit of practice to correct).

Default -- The terms "by default" or "default setting" don't have anything to do with a "fault". It means that the selection has a pre-set, or normal, condition unless the user selects a different one. For instance, the Rack view is the "default view", which means it will be the view shown unless the user clicks on a tab to choose another view.

System Requirements

Campground Master is designed to operate on any PC that can support Windows 95 or later. Generally any computer manufactured after 1996 will work, however following the recommendations below will allow for smoother operating and better functionality (for instance, more features are available when 800x600 or better screen resolution is used, colors look much better on a true-color display, a lot more data can be kept before a Purge is needed if you have more RAM, etc.).

Requirements:

- Intel 80386 or better processor (Pentium at 200MHz or better is recommended)
- Microsoft Windows 95, NT 4 or later 32-bit operating system.
- 24MB RAM or more (256MB recommended for 95/98/ME, 512MB for NT/XP)
- 640x480 VGA 8-bit graphics (800x600 with 16-bit graphics recommended)
- 25MB free hard disk space
- A 2-button mouse

Installing the Software

If you have the software on CD-ROM it is basically self-installing. Simply insert the CD-ROM and answer the prompts as they appear. If installation does not start automatically, follow this procedure:

1. Insert the CD-ROM into the CD-ROM drive.
2. From the Windows **Start** menu, select **Run...**
3. Type **d:\setup** in the edit box, where "d:\\" is your CD-ROM drive letter.
4. Press **Enter**.

If you have obtained the software in an electronic (e.g. a download from the Internet), then simply execute the file to start the installation (double-click on its icon in Windows Explorer).

The installation program should start and ask you to make confirmations. Just click the **Next** button on each prompt to continue, and the software will install in the typical way most users need.

Running the Software

When installing the software, you will have the option to have Campground Master start up automatically when you start your computer. In addition, an icon will be placed on the Windows desktop, so you can start or restart the software any time by double-clicking the icon. (For those who have trouble with double-clicking the mouse, you can also click an icon once and then press the **Enter** key to start the program.)

Note: You may see two icons for the program, in which case one of them will be labeled "Demo" or "Sample Database". This icon can be used to start the software with the sample database, which can be useful for experimenting. Once the software is in full use, this icon should be deleted to avoid confusion.

Logging In and Out

Once the program starts, you will be asked to Log In with an Operator Name and Password. This is necessary to access any of the functions other than opening a database. The software initially has one operator with administrative access (able to do everything), so if you have not been given another user name you can log in with the operator name "**Administrator**" and the password "**Password**". (Type them without the quotes.) Once your system is set up, these should be changed for security purposes. This is covered in detail later.

To log in, just follow these steps:

1. Click the Log In button on the toolbar (the key icon) or click on Log In/Out on the main menu.
2. Type your login name. Don't worry about whether to use capital letters or not, it doesn't matter.
3. Press the **Enter** key (or **Tab** key) to move to the Password field.
4. Type your password. Again, don't worry about capitals. Note that you won't be able to see the letters you type -- they will all be shown as asterisks (*). This is for security. If you make a mistake, it's best to back up to the beginning with the **Backspace** key and start over.
5. Press the **Enter** key (or click on the Log In button with the mouse).

You should now be logged in. If you get an error message, you can go back and try again.

Once you are logged in, you should see more of the toolbar icons enabled (in color), and you can click on the tabs (Arrivals, Departures, etc.) to change views. The number of things enabled will depend on your access level.

Logging Out

When you want to log out of the system (to prevent others from gaining access and changing data), just open the Log In/Out dialog as above and click the Log Out button.

The Main Program Window

Caption / Title Bar



This is the standard Windows caption used by nearly all Windows program. Besides the name of the program, the Campground Master caption has a few informative items in it.

Database name -- You will likely be using the same database at all times, so the database name will probably be the name of your campground. If you do change databases, for instance to manage multiple campgrounds, this will tell you at a glance which one you are working with.

Change indicator -- If an asterisk (*) appears next to the database name, this means that the database has been changed and not yet saved to the disk. (You will rarely see this if you have the Auto-save option turned on.)

Operator -- The currently logged in operator name is shown, so that you know whether or not you're operating under the correct log-in.

Workstation -- If you are authorized for the networking version, the caption will also show the workstation ID and (optional) nickname for this workstation.

Window control buttons -- These are the standard Windows buttons to minimize, maximize/restore, and close the window. If you have used Windows programs before, you should be familiar with these. In case you're new to Windows...

The first button, which looks like an underline character (_), will minimize the window (shrink it to a button on the Windows task bar). To get it back after minimizing it, just click on its task bar button.

The second button will either be Maximize or Restore, depending on the current state of the window. Clicking on it once will enlarge (Maximize) the window to fill the entire screen, and clicking it again will restore the window to its normal size. In most cases, you will want to keep the window maximized so you can see as many reservations as possible in the Rack view..

The last button, (X), will close the window and shut down the program. This is the same as selecting **Exit** from the **File** menu.

Main Menu



The main menu is always at the top, just under the program caption. It contains all of the main functions of the program and is fairly self-explanatory (each function is detailed elsewhere in this manual).

Toolbar



The toolbar is the row of picture icons below the menu. (It can be turned off from the View menu.) The Toolbar can be used for quick access to the most common top-level functions. Each of the functions are also available as Menu commands and as function key shortcuts (F2 through F8), so you can turn off the toolbar without losing functionality if you prefer using the menu or if you are comfortable with the keyboard shortcuts. The buttons (icons) will normally be shown in color, but will be gray if the option is disabled. For instance, all but the Log-in button will be gray until an operator is logged in.

New Reservation (Phone) -- This will open the New Reservation dialog, the same as the menu selection Reservations | Add New Reservation.

New Customer (Faces) -- This opens the customer editing dialog, the same as the menu selection Customers | Add New Customer. It's handy for adding new customers or for looking up customer information (you can use the Find button on the dialog immediately without adding a new customer).

New Transaction (Cash register) -- This opens the New Transaction dialog, the same as the menu selection Transactions | Add New Transaction. This is the generic transaction dialog, where you can enter any kind of transaction. It's most useful for entering transactions that are not bound to reservations, such as counter sales, expenses, or other income.

Save Database (Diskette) -- This will instantly save the database, the same as the menu selection File | Save. This button will be gray (disabled) most of the time if you have the Auto-save option enabled. Otherwise, it's the easiest way to save the database, which you should do as often as possible.

Backup Database (Safe) -- This will create a backup copy of the database, the same as the menu selection Maintenance | Back Up Database. You should make a backup at least once per day, and this button will help you remember to do that since it's right next to the Log-in button.

Log In/Out (Key) -- This is used to log an operator in our out, the same as the Log In/Out menu selection.

Print (Printer) -- This will print the currently visible tab view, the same as the menu selection File | Print (or File | Print Preview if the Always Preview option is enabled).

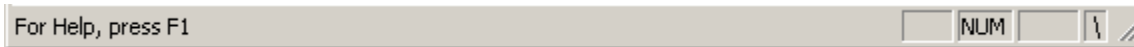
Search (Magnifying glass) -- This opens the Search function, which allows you to search the current tab view for a site name or customer name. The view will automatically scroll to the first match found. This function has no menu equivalent, but can also be invoked with the **F9** key or **Alt-S**. To search the entire database for a customer or reservation, instead of just the current tab view, see the Find Customer and Find Reservation menu functions.

Tab Views (Dynamic Interactive Reports)



This is the main portion of the screen, where most of the action is. It will fill the remainder of the window between the toolbar and status bar (if present), regardless of the window size. It's discussed in detail in the *Dynamic Interactive Report Screens* section.

Status Bar



The status bar appears at the very bottom of the window, and can be turned on and off from the **View** menu. It simply shows short help-hints for menu items (whatever the mouse cursor is hovering over), some progress messages (for instance, "Saving database"), and the state of keys like **Caps Lock** and **Num Lock**.

If you're running the networked version, a small box will be shown at the right side with a heartbeat indicator. This indicator changes each time a message is sent or received over the network, indicating that it's connected and functioning. (The character shown is meant to simulate spinning clock hands, or a propeller.) If the network connection is not functioning, an "X" will be shown.

Helpful Hints --- Getting the Most Out of Your Keyboard and Mouse

Right-click is your friend

Campground Master makes extensive use of the **right** mouse button to open "Context Menus". These are menus that contain quick-access functions for the object that you right-click on. For example, when looking at any of the main views, you will be able to right-click on a reservation to view any of its details and perform any functions appropriate for it at the time, such as checking in, changing sites, extending a reservation, and much more. The general rule is: right-click when in doubt, just to see what you can do.

By the way, once you right-click to open the menu, the next click should use the **left** mouse button. In other words, the *only* time you need to use right-click is to *open* the context menu. Left-click does everything else. And once the menu is open, if you don't want to do anything on the menu then you can close it either by clicking somewhere else (*anywhere* else besides on the menu), or by pressing the **ESC** key on the keyboard.

For more details, see the Right-Click Functions in the *Dynamic Interactive Report Screens* section.

Keyboard shortcuts

There are several common Windows keyboard shortcuts that come in handy Campground Master. Learning these can make you much faster at using the software, since moving the mouse and clicking takes time (and is often frustrating when you're trying to hurry and click in the wrong place!).

Function Key shortcuts

Instead of clicking on the toolbar icons, you can use a corresponding function key. Because **F1** is the standard key for Help, the toolbar icons correspond to F2 through F8:

- **F1** -- Help
- **F2** -- New Reservation
- **F3** -- New Customer
- **F4** -- New Transaction
- **F5** -- Save database
- **F6** -- Back up database
- **F7** -- Log in/out
- **F8** -- Print (this will also work on any dialog with a Print button)
- **F9** -- Search

Navigating the tab views with the Tab key and function keys

To quickly change the shown Tab View (assuming no other dialogs are open), you can either use the **Tab** key or **Shift-Function** keys. The **Tab** key will switch to the next one (press **Tab** repeatedly to cycle through them), and **Shift-Tab** will switch to the previous one. A more direct route is to use the function keys with **Shift** held down to switch directly to the corresponding view -- for instance, **Shift-F1** for the Rack view, **Shift-F2** for the Arrivals view, and so forth.

Alt-key shortcuts to the menu and dialog buttons

Whenever you see a letter underlined in the top-level program menu (the "main menu") or on a button in a dialog, you can use the Alt-key with that letter instead of clicking on it with the mouse. For example, hold the **Alt** key down while pressing the "R" key to open the Reservations menu since the "R" is underlined. Once a menu is open (either one of the drop-down menus on the top or a right-click context menu), you can just press the associated letter without the Alt key. So to Add a Reservation, simply press **Alt-R** followed by the "A" key.

Alternative to right-clicking on the tab views

While the right-click can be your friend, there may be times when you would just rather not use the mouse. If you have a "Windows 95 keyboard", you can simulate the right mouse button with the "menu" key. This key is usually just to the left of the right-hand **Ctrl** key, and has a small picture of a context menu on it. But first you have to get to where you want to "click", since right-clicking is all about performing a function on a particular item. In Campground Master, use **Alt-G** to put the cursor, or selection focus, into the grid if it's not already there. (This generally shows up as one of the cells being dark blue.) Then use the 4 **arrow** keys on the keyboard to move the selection to the cell you want, and then press the **menu** key. The context menu will open, and then you can use the keyboard to select a menu item, either with the up/down arrow keys and **Enter**, or by using the underlined letter shortcut (eg. "T" for Transactions on a reservation context menu). You can also scroll the grid using the keyboard. After pressing **Alt-G**, use the **Page Up**, **Page Down**, **Home**, and **End** keys to quickly move a page at a time up, down, back, and forward. You can also use the arrow keys to scroll past the edge, and the grid will move so that the selection is always visible.

Searching on the tab views

You can search for a particular Site or Customer on any of the tab views by pressing **F9** or **Alt-S**. The main uses for this are to quickly scroll to a desired site on the Rack view, or to locate a site or customer on the other views.

When you press Alt-S, a small dialog will appear -- just type any portion of a site name, or the start of a customer's last name. There is no selection on the dialog for what you're searching for -- it will first search for a site name containing the characters you entered (it will search both the abbreviations and the "Site Name" fields). If no match is found, it will then look for a customer. So for instance if you're looking for a customer with "Smi" in the last name but you have a cabin named "Smiley's", it will match the cabin first.

Either way, if a match is found then the view will highlight the matched reservation (scrolling to it if necessary). In the case of the Rack view, a match of the site name will highlight the first visible cell of the site and a match of the customer will highlight the first cell of the reservation. (Note that it will only search reservations from today to the last date of the Rack that can be scrolled to, corresponding to the Maximum Future Days setting.) On any of the other views, when a match is found the entire line will be highlighted.

Data Entry Basics

Navigating in dialogs with the Tab key

You will spend a lot of time entering information in dialogs, such as customer information and reservation details. Therefore it's a good idea to learn the fastest way to get around in them. Generally you will use the **Tab** key to jump from one field to another. This will move the text input cursor to the next logical entry field or check box in the dialog. Mastering the **Tab** key (and **Shift-Tab** to back up a field) and also the **Alt**-key shortcuts for the buttons will allow you to do nearly everything in a dialog from the keyboard, without moving your hand to the mouse. Note that the **Enter** key will also move to the next field in most cases, but this was implemented only as a convenience for users that are familiar with an Enter-based system. This is not the Windows standard way of moving between fields, so it's best to get used to using the **Tab** key.

Selecting from drop-down lists

Many of the fields in dialogs will use pick-lists (most of which are user-definable), in the form of a drop-down list. These will have small down-arrow buttons on the right-hand side of the entry field. Initially you can use the mouse to click the down-arrow to open the list, and then click on the desired option. Alternatively, you can use **Alt-down-arrow** to open the list with the keyboard. Whether it is opened first or not, you can use the **up** and **down** arrow keys to change the selected item. Better yet, once you are familiar with the contents of the list, you can select items quickly using the first letter of the selection. For instance, typing "**F**" in the Rig Type field will typically select Fifth Wheel automatically. In cases where the first letter is used by more than one selection, just press the letter repeatedly to change the selections. For instance, "**T**" may take you to the Tent selection first, and pressing "**T**" again will go to Travel Trailer. (Since "TT" is often the abbreviation for Travel Trailer, this just happens to make sense!)

Checking boxes with the keyboard

When a check box field is selected on a dialog (indicated by a dotted line around it), you can check or uncheck the box by pressing the **spacebar** on the keyboard.

Working with Dates

Another common dialog entry field is a date, which normally uses a "date-picker" control. There are several ways to enter a date. One way is with the mouse -- click the down-arrow on the right side of the entry field, and a calendar will open up. Just click on the date you want, using the arrow buttons to change the month as needed. For moving a large number of months, you can click on the month at the top of the calendar to produce a drop-down list of months to select from. You can even click on the year to produce up/down buttons to quickly change years.

However, the keyboard can be used effectively if you already know the date you want to use without referring to a calendar. When entering a date field, the month will usually be highlighted at first. Just start typing the date as month/day/year, using slashes just as you would write it. The date will be entered as you would expect. You don't even have to enter the whole year -- for instance, type "**5/3/1**" for May 3rd, 2001. If all you need to change is the day, it's even simpler. To skip the month, start typing with the slash ("/"), then type the day. For instance, to change 11/5/2001 to 11/9/2001, just type "**/9**", then you can **Tab** to the next field as needed. There are other ways also -- you can use the **up** and **down** arrows to change the month, day or year (whichever is highlighted), and the **right** and **left** arrows can be used to move the highlight back and forth between the month, day, and year.

Check-Dates

Some date fields, such as the Paid-Through date, also contain a check box. This is a combination field, which effectively allows you to select "None" as a date. When the box is unchecked in this case, it means there is no Paid-Through date (they have not paid). The date will be "grayed out" (lighter color) to indicate that it is not actually used. When the box is checked, the date is used just like any other date. Note that selecting a date with the mouse will automatically check the box, allowing you to save a step. If using the keyboard, you will need to check the box first (the **spacebar** can be used to do this from the keyboard), then you can edit the date by pressing the **right-arrow** key to get to the date portion of the field.

Copying and Pasting

The Windows operating system supports copying text from one place to another, to save retyping things over and over. The Windows "clipboard" is used for this -- you "copy" text onto the clipboard, and then you can "paste" it somewhere else. This can be useful if you accidentally type information in the wrong place and want to move it, and also when making multiple copies of the same text. There are two different key sequences that accomplish the same thing, so you can use whichever is more comfortable for you. Basically, it is a 4-step process:

1. Highlight the text you want to copy, using the mouse (click-drag) or the keyboard (shift-arrow).
2. Copy the text to the "clipboard", with either **Ctrl-Insert** or **Ctrl-C**.
3. Move to where you want to copy the text, either with the mouse or keyboard.
4. Paste the text from the clipboard with either **Shift-Insert** or **Ctrl-V**.

Note that the text will stay on the clipboard until something else is copied, so you can paste it to another dialog field, or paste it as many times as you like by repeating steps 3 and 4 above.

If you want to move the text instead of copy it, then you can use "cut" instead of "copy" in step 2 above. Use **Ctrl-X** or **Shift-Delete** to cut (or delete) the text. The text will also be copied to the clipboard so you can paste it. Be careful *not* to use **Ctrl-Delete**, since this will delete it permanently rather than put it on the clipboard. (This is one good reason to use **Ctrl-X** instead of **Shift-Delete**, to avoid confusion.)

Note that you can also use this to get data from a report grid into another program, such as Excel. Just highlight the desired calls on the grid (or press **Ctrl-A** to select all cells), then **Ctrl-Insert** or **Ctrl-C** to copy to the clipboard. Then switch to the other application and paste the data. However, only the data cells can be copied this way, not the header row and column. To get the entire report into another program, use the [Export to CSV function](#).

3 Setting Up Your Campground Database

Overview

This section provides a "brief" overview of what is required to set up a Campground Master database for your campground. For the details, refer to the Maintenance section later in this manual. Even if someone else does the setup, it can be helpful to learn about the basics so that you understand the software better, and in case you want to make occasional changes. Whenever you add or change rental sites, add new operators, or want to do things like adding a transaction category, you can make these changes yourself.

Database Basics - Make Backups!

The Campground Master database is contained in a single file, which has all of the information specific to your campground. This includes the database definition itself, program options and settings, operators, sites, and pick-lists as well as all customers, reservations and transactions. The database file may be given any name you like (typically the name of the campground), and should have a file extension of ".PRK". After setting it up for the first time, you should save it to the hard disk (**File -- Save As** from the main menu). Typically the file will be placed in the same folder on your hard drive as the program itself, but may be placed anywhere you like.

It's **very important** to back up your database on a regular basis, in case of disaster or computer malfunction. The software has a built-in backup feature, for ease of storing a copy of the database on a floppy disk. We recommend doing a **daily** backup, using a different floppy disk (or disk set, if more than one is required) for each day of the week. Using color-coded and day-labeled disks is a good idea. This way you have 7 different backup copies, and couldn't lose more than a day or two of work unless you have multiple floppy disk failures. (Don't hesitate to make a backup more often, particularly early in the process of setting up the database in case you want to go back to a previous version and start over.)

In addition, we recommend at least a **weekly** off-site backup. Rotate at least 4 different disks (or sets), and make a new backup every Friday night, for instance. Take the backup to another location -- at least in another building. This will help protect your data in case of a fire, theft, or other disaster. In addition to the security of backups, this will give you about 1 month of "oops" protection -- if you realize at some later time that a major database change was made by mistake, you could go back to retrieve the data up to a month old.

An operator must have Manager access to create and restore backups. See the Maintenance section for more details on making backups and restoring them.

Campground Master.ini File

There are a few settings that aren't part of the database because they are specific to the computer. These are stored on the computer so they are used each time without the need to reset them, but are not part of the database file itself. They are stored in a "Configuration settings" file, named **Campground Master.ini**, which is placed in your Windows directory.

The settings stored here include the Printer Setup settings, Network Settings, and the path to the last database opened. It's a good idea to keep a backup of this file for convenience, however this will need to be done manually (just copy the file to a floppy disk), since it's not part of the database backup function. If you are changing to a different computer, do **not** copy this file to the other computer, since the settings may not apply to that computer and can cause errors.

Database Organization

A little background will help you understand how reservations and other database elements interact. Some of this may be getting pretty technical, and it certainly isn't required knowledge to operate the program. But if you prefer to know more about the software so you understand *why* it works the way it does, then this section will help.

The Campground Master database is a *relational* database. This means that it consists of multiple *tables*, which can be related to each other through *relational links*. There are four main tables in the database -- Sites, Customers, Reservations, and Transactions. (Parks and Operators are also tables, as well as all of the Pick Lists, but they are not important for this discussion.) Each table is a collection of *records*, where each record represents one item (a customer, a site, etc.), and each record is a collection of *fields*, where each field is a bit of information (a customer's last name, phone number, zip code, etc.).

In most cases, you will work with the records of a table individually -- for example, when using the Reservation Details dialog, you can only see or change fields in one reservation record at a time. Of course when viewing reports, you are looking at multiple records, but usually all of the same type. Where there is linking going on, it will be transparent to you. But understanding what links to what will help you make sense out of some things, like why the Notes column on the Arrivals View doesn't show the notes you just added to the customer's record (because the customer notes are separate from the reservation notes).

This is how the main data tables are related, or linked, to each other:

- Each Reservation record is linked to one Site record (unless its site has not yet been assigned) and one Customer record. So you can get the site information and customer information for any reservation.
- In addition, a Reservation can have a list of other Reservations linked to it (concurrent reservations for the same customer and dates, but on different sites). This can be used for group reservations, for instance.
- Each Transaction links to the Reservation and/or Customer it applies to, if any. The Reservation and Customer also link back to the Transaction.

As you can see, the Reservation table is the primary table from which everything related to it can be reached. When a report shows the customer name and phone number for a reservation, that information is actually coming out of the Customer table, through the customer link in the reservation. Thus if the information is changed for the customer, it is automatically "changed" for every reservation that the customer has ever made.

The advantages of relational databases are many, but primarily it helps keep data consistent, and allows the database to be much smaller since unique information is only stored once. (Imagine if you had to enter the site's details for every reservation!)

Setup Checklist

Here is a quick checklist of things that you should do to get the software set up, including some option settings that you may want to set up. Refer to the appropriate sections for more details

Database Setup:

- Park information and Authorization Code -- this must be done first to enable the software!
- Operators -- define administrator, manager, and reservation / clerk operators as needed.
- Pick lists:
 - Site Classes and Types. Keep in mind that these affect many things, especially rates selections.
 - Pad Types and Site facing (if used)
 - Transaction Categories and Payment Methods -- very important for financial reporting.
Note: If you plan to export transactions to QuickBooks, you may want to base these on your QuickBooks accounts, to make the mapping easy.
 - Discounts list
 - Rig types
 - How-heard list
- Data table fields -- decide what fields are important to you, and disable any that you won't use. In particular, make sure the Site fields for metered electric, gas and/or water are set appropriately.
- Sites -- set up each campsite. You might set up just a few sites for now to help in testing other settings, and continue later.
- Taxes -- set up the applicable tax rates (make sure you have a Transaction Category for each one first).
- Rates -- set up rates for each site type or class, with specific dates, applicable discounts, etc.
- Metered electric, gas and/or water support (see Sites Setup).
- Deposit and Accounts Receivable account balances, if used.
- Import customer and/or reservation data from another source, if available.

Other Settings:

- Program Options and Settings
 - Date format, Confirmation number format
 - Prompts and other program options
 - Color coding preferences
 - Printing Options: Reservation Receipt default format, number of copies, etc.
 - Network setup, if applicable
- Options for each tab view (use the Options buttons on each view.)
- Notice text and confirmation letter text for receipts / letters

Park Information and Authorization Code

The Park information is not seen very often in the software, but it's very important. It primarily consists of the campground's name, address and other contact information. This is used on the printed receipts. There are also three Notes fields for the park, which can be used to add additional notes to the printed receipts.

The other important thing about the park setup is the Authorization Code. This code is required to access full functionality of the software (in fact you won't be able to define your sites without one), and is keyed off of the other park information. When you purchase a license for Campground Master you will need to provide your park name and address information, which is used to generate a Key Code. Cottonwood Software will then issue you an Authorization Code, which you must enter to unlock the software. Thus, if the park changes its name or address, a new authorization code will be needed (but you will not be required to purchase a new license unless this is an *additional* installation).

If you have already purchased the software, then the procedure for entering the authorization code will be either in the pocket in the front of the printed manual or in an E-mail confirmation message (depending on the method of purchase). See Park Setup in the Maintenance section for more details.

Operators

Campground Master requires a log-in for security purposes, and for tracking the originator of reservations and transactions. The current operator's name, as well as the time and date, are recorded for every financial transaction, reservation creation, cancellation, check-in and check-out. It's recommended that every person using the software have a different operator name, and be assigned an appropriate security level. In addition, one or more **Administrator** operators should be set up, which may be additional accounts for someone. For instance, the campground manager may have a **Manager** level log-in and also an **Administrator** log-in. This would prevent accidental administrative changes when logged in as a manager, but allow administrator access when needed.

Operator information can only be viewed or changed by an administrator. If no operators have been set up yet, use the default login -- Operator Name "**Administrator**" and Password "**Password**". You should change these to something that only you know, but don't forget the administrator login or else you won't be able to get back in to the maintenance functions!

See the Operator Setup in the *Maintenance* section for more information on setting up operators.

Pick-Lists

There are several "pick lists" used in the software for fields that have a limited number of options rather than free-form text entry. These are usually presented as a drop-down list in dialogs. This "limitation" is actually a great advantage, however -- it speeds data entry, better organizes the database (and actually makes it smaller and faster), and allows for easy filtering of reports. For instance, you can generate financial reports for a specific site type or class (RV lot, cabin, etc.), certain payment methods (credit cards, cash, Visa, etc.), or any transaction category (daily rate, monthly rate, gift shop, laundry expenses, etc.).

Since each of the pick lists is user-definable, it's not really a limitation at all. The software comes pre-defined with common selections in the pick lists, but you can edit, add, or delete selections as needed (and even add more items later), and define the order in which they appear in the lists. Careful selection of list items is recommended (particularly the Site Types, Site Classes and Transaction Categories), because they affect how you will use the software, and because once the lists are in use, you cannot delete items without causing gaps in the useful data.

See Pick-Lists in the *Maintenance* section for more information.

Customizing Data Table Fields

Each of the data tables in the database (Sites, Customers, Reservations, Transactions, etc.) are made up of a list of Fields. The fields included in the tables are user-definable to a certain extent, adding to the flexibility of the software. For instance, if you don't have a need to ever know about the Estimated Arrival Time for a reservation, you can disable that field and it will be removed from the database. Besides saving disk space, the disabled field will be removed from the dialogs resulting in a cleaner view and slightly faster data entry.

Many of the fields are "Fixed", which means that they cannot be disabled. These fields are crucial to the operation of the software, such as the reservation start date. Others are optional and can be enabled or disabled as needed, as in the example above.

A note about field values -- all fields can have a "blank" state in addition to having data in them. This saves both space and confusion -- for instance, the "number of children" field for customers is blank (unknown) unless you enter a value for it -- it does not assume (or show) "0" children unless you actually enter "0". However there are some cases where "blank" is the same as assuming a value, such as yes/no fields. Blank is assumed to mean "no" for fields like the customer's "Good Sam member" field. In other words, if you don't check the Good Sam box on the customer entry dialog, it assumes "no".

There is a special category of fields called "Attributes", which appear in the Reservation table and the Sites table. There are dozens of attributes, like "Has 50 Amp", "Waterfront", and "Pad Type". These are used primarily for selecting Site Preferences for a reservation. Once the preferences have been selected, the list of sites available will show only sites that have matching attributes. Thus you can easily match a customer to a site that will meet his or her needs the best. Many of the pre-defined attributes won't apply to your particular campground, so you can disable these or rename them to something more useful. For instance, if none of your sites are waterfront but you have some desirable cabins that are cliff-side, just change the text from "waterfront" to "cliff-side".

Note that once the database is in use, you can still enable and disable fields or change their text. However, be aware that any data in newly-disabled fields will be lost even if you re-enable the field later (assuming the database is saved to disk and reloaded before re-enabling it).

See Define Data Fields in the *Maintenance* section for more information.

Sites

The Sites table is the main part of the database setup for your campground. Here you define all of the rental "sites". A site can be a campsite, an RV lot, a cabin, a boat dock, a pavilion, a bicycle, or anything else you need to rent out by the day. The sites table is what shows up in the Rack View (usually the Y-axis of the Rack grid), as well as playing a large part in how other views are used. Every aspect of the sites is user-definable, including the name (actually 3 different designations), the type, the dates available for rental, and dozens of attributes that can be used to quickly determine whether a site fits a customer's needs.

There are some Pick Lists that should be defined before setting up the sites: the Site Classes, Site Types, Site Facing and Pad Types. (These should have been defined in the earlier steps.) These are helpful in categorizing the sites and simplifying the selection process when making a reservation, as well as filtering statistics when generating reports. Once these pick lists are set up, you can define the details of each site. The main pick lists are the Site Types and Site Classes, as these lists appear on many views and dialogs and makes it easy for you to limit the current view to just Full Hookup sites or Tent sites, for instance. The Pad Types and Site Facing lists are helpful when selecting site preferences for a reservation to narrow the search for a site.

See Sites Setup in the *Maintenance* section for more details.

Taxes

You will want to set up any applicable tax rates for ease of transaction entry, rates definitions, and reporting. First make sure you have a Transaction Category for each one (Maintenance / Pick Lists / Transaction Categories), then set up the Taxes.

Note that each different tax category will be will be reported separately and printed separately on receipts. Also note that when defining Rates and entering charges, the tax rates can be used in any combination so there's no need to define "combination" rates.

See Taxes Setup in the *Maintenance* section for more details.

Rates

You will want to set up your applicable rental rates for each site type/class, plus add-on charges, meter rates if needed, and perhaps other rates for convenience. This is one of the more involved processes, and is completely optional (you could enter the amount of each transaction manually), but is well worth it.

Since rate definitions can be categorized by Site Type, Site Class, and Discount, the design of those pick lists is very important. When selecting a rate to use for a reservation, the list of rates displayed will be filtered by the site type, site class, discount, and the reservation dates. Therefore you can minimize the selections shown by planning your site types/classes and discount selections carefully.

In particular, You should have **at least** one Site Type for each different *basic* rental rate. This does not need to include *add-ons* like 50A electric, phone, etc. Likewise, Rates definitions are easier if you have **only** one site type for each rate needed. Otherwise, you may have to define duplicate rates to cover each site type. Alternately, you can make Site Types more specific so that selection by customer preferences is easier, and use Site Classes to differentiate the rates. In this case, you would define one Site Class for each basic rate you have.

Discounts work similarly, but in most cases these will not be as complicated as site types/classes, since there is usually only one kind of discount rate for each discount club.

See Rates Setup in the *Maintenance* section for more details.

Deposit and A/R Balances

Campground Master keeps a running balance of unused deposits (advance payments toward reservations) and accounts receivable (charges not yet paid). If your account methods include tracking either or both of these, Campground Master can keep track of them for you, or at least help verify that things are in balance if you track these separately.

Deposit and Accounts Receivable tracking and adjustments are discussed further in the *Working with Transactions* section, and making adjustments is discussed in the *Maintenance Functions* section. What you need to know when setting up your database is that you can enter a "starting balance" for either of these, so that the running totals match your previous figures. This is entered as an adjustment, and should be done before entering live transactions so it's recorded in front of other transactions. Deposit and A/R Balance reports can be found in the Transactions tab view report (Summary Transaction Reports).

Import Data From Other Sources

If you have your customer data (or even reservation data) in some other electronic form, it can probably be imported to Campground Master. This can help jump-start the process so that you don't have to start re-entering customers from scratch. However, we recommend entering at least several customers and reservations yourself as practice before going live -- you need to get familiar with the process. In fact, if you have the time or help to enter your entire customer database manually, it's not a bad idea to do so to make sure it's entered in the best format possible, and so that all possible fields are covered.

The Import function is fully covered in the *Import and Export Functions* section later in the manual.

Metered Electric, Gas and Water Support

There are 3 things that need to be done for properly supporting metered electric, gas or water:

1. Enable the appropriate fields in the Sites Data Field Definitions (or disable them if no metered support is needed).
2. Enter the current meter reading for each site that has a meter (even if it's 0).
3. Define Rates for the meter charges.

Now whenever you select the electric meter rate for charging a customer, a simple dialog will appear to enter the new meter reading. The Site record will be automatically updated with the new reading, date, and reservation, and the appropriate charge will be added to the reservation.

See Define Data Fields, Sites Setup and Rates Setup in the *Maintenance* section for more details.

Network Settings

If you have purchased the networking version of the software for use with multiple networked computers, then you need to install the software on each computer (workstation), and then enter the appropriate settings on each computer.

See the [Maintenance | Network Functions | Network Setup](#) function, and the Network Functions section of Maintenance Functions for complete information.

4 Program Options and Settings

Overview

There are several settings that affect the way the data is presented or the way the program operates.

Some of these options are likely to be set up once and not changed, while some are likely to be changed often in order to view things in a different way. They can be changed at any time without affecting the database.

Some of these options are found in the File menu, some in the View menu, and some in the Maintenance menu. Further options specific to each Tab View are set through the Options button in each tab's header area.

File - Printing Options

These settings, found in the File menu, allow some customization of the way reports, receipts, and other printed formats appear on the page.

Reports

These options apply to any of the grid-type reports -- tab views, single records, and any other "reports".

Zoom percent (100 = normal) -- This affects any of the grid reports, as long as the Fit Output to Page option is *not* set. With the 100 percent value, the printed grid will be approximately the same physical size as on the computer screen. You can adjust this value to suit your preferences. Set it to a smaller value, for instance 80 percent, to fit more on a page. If you want a larger printout, perhaps for posting the day's arrivals on a bulletin board, set it to a larger value like 125.

Always preview reports before printing -- When this option is set, you will get the chance to preview the printout before actually printing a report, even if you don't select **Print Preview** from the File menu. In fact, for reports that are printed from **Print** buttons in dialogs rather than the main menu or toolbar button, this option is the only way to get a preview. It's highly recommended that you leave this option turned on so that you don't accidentally print reports in a tiny font or that will span many pages due to an improper Fit Output to Page setting. Note that this option only applies to reports and other grid-type printing, not to receipts & invoices, mailing labels, envelopes, etc. For those, see the Always Preview Receipts option below.

Show printer setup dialog when printing reports -- by default, a dialog will appear every time you print with options for printer selection, layout, number of copies, etc. This requires an extra step to "OK" this dialog each time. By checking this option, that dialog is skipped so there's one less mouse click required. It will use the default settings from Printer Setup for reports. A small "Printing" message will appear momentarily just to let you know that it's printing, since there may not be any other indication if you're not near the printer.

Print Black & White -- When this is selected, all grid reports are simply black text, optionally with grid lines (according to the Grid Lines option described later). When not selected, the grids will use the exact colors as seen on the display, including the gray headers and the color-coded reservation status. Black & White will result in more readable reports on non-color printers like laser printers, and also helps save ink and can speed up report output on color printers. It's common to want some reports printed in black & White and others in color, so this option is also available under **File** in the main menu for easy access.

Fit Output to Page Horizontally -- When this is selected, the font size in reports will be shrunk or enlarged, as needed, so that they fit the width of the page. (The reports can still take multiple pages if it's longer than the page vertically, even with the horizontally-fit font.) This can result in some very small text (or very large text in some cases if the "Allow stretching" option is selected), but will save paper and make some reports easier to manage. When *not* selected, a fixed font size will be used (see Zoom percent below) no matter how large the report will be, which could cause the report to span many pages horizontally and/or vertically. It is common to want some reports printed with this option set and others without it, so this option is also available under **File** in the main menu.

Allow stretching to the full width -- When this is selected along with Fit Output to Page Horizontally, the font of any grid-report will be enlarged so that the report fills the entire width of the page if necessary. This is not normally desired, but might be useful to print out extra-large text for posting vacancies in a window, for instance.

When printing single records...

Skip blank fields (when printing single records) -- When using the Print button from dialogs such as Reservation Details, Site Details, and Customer Details, this option will shorten the output so that it only shows fields that are filled in. This will usually result in a printout that will fit on a single page.

Use a grid format (when printing single records) - When using the Print button from dialogs such as Reservation Details, Site Details, and Customer Details, this option will make the printout be in a grid. When turned off, the printouts will be in columnar text format, which is faster and uses less ink.

Receipts

These options apply to the various types of receipts and other "forms".

Reservation Receipt Default Format -- Select the receipt format you will use most often. You can select the format any time you print a receipt (without coming back here), but setting the most common one here will save steps later. See the section Working with Transactions for details on each format.

Default receipt copies to print -- If you usually print duplicate receipts, you can change this to '2' so that you don't have to change the number of copies every time you print a receipt. (You can still change the number of copies on the print dialog when printing, this just determines the default number.). Note that this also affects the batch receipt printing, so be careful when printing batches of receipts if only one copy is needed of each receipt.

Always Preview Receipts Before Printing -- When this option is set, you will get the chance to preview the printout before actually printing a receipt. (This option is the only way to get a preview for receipts.)

Show printer setup dialog when printing receipts -- by default, a dialog will appear every time you print with options for printer selection, layout, number of copies, etc. This requires an extra step to "OK" this dialog each time. By checking this option, that dialog is skipped so there's one less mouse click required. It will use the default settings from Printer Setup for the selected receipt type and the number of copies selected above. A small "Printing" message will appear momentarily just to let you know that it's printing, since there may not be any other indication if you're not near the printer.

Show transaction category for charges (eg: "Gift shop : " prefix before description) -- Charge transactions always have a transaction category and a description. Generally the description is enough to show on the receipts (and the description defaults to the same as the category when entering transactions), so this option is disabled by default. If you want to make sure the category is also printed on receipts (if not included in the description already), enable this option.

Combine taxes of the same kind into a single line on receipts -- When entering transactions, taxes are usually added automatically. This can result in multiple Tax transactions of the same kind, especially when entering counter sales. This option, which is enabled by default, will combine all taxes of the same type into one line (total) on the receipt. Different tax types, for instance Sales Tax and Hotel Tax, will still be on separate lines. If you need to see each tax entry separately, then turn this option off.

Show separate charges for each concurrent site on receipts by default -- This simply determines whether the "Use separate entries for each site" option is checked by default when selecting rates. It can be changed when selecting rates, so this option just determines the default setting. See *Selecting Rates* for more details.

Use the site "Name" on reservation receipts -- (checked by default) Normally the full site name is used on receipts, but if you prefer the short Abbreviation (from Site Details), then uncheck this option.

3" Receipt printer native font name -- If you are using a receipt printer, this should be set to the name of the printer's "native" font, generally a font that is used for 40-column text output. This is used if the receipt format "3" Receipt Printer, native font" is used for printing transaction receipts. You will need to find the name of the font from the printer's manual or programming guide. This font often refers to "cpi" (characters per inch), like "ANK 15cpi" or "21cpi".

Columns -- This is only used with the native font receipt format for 3" receipt printers, and specifies how many columns are available on the printer. Most receipt printers support 40 columns, but some can use a smaller font for more columns.

Offsets

Printer Offsets -- You can fine-tune the printer offsets for printing forms that require precise positioning such as mailing labels. The Top and Left numbers represent the closest point to the edge that the printer can print. If you find labels printing too close to the top (or left), you will need to *decrease* the offset to compensate.

Address position for Envelopes -- Set the offset from the edge of the envelope where you want the address to appear.

Address position for Letters and Invoices -- Set the offset from the edge of the page where you want the address to appear for full-page invoices and confirmation letters. This is important if you use window envelopes. Otherwise, you can set them closer to the top of the page to save space for more transactions.

File - Printer Setup

There are different printer setup functions for each kind of printing that the software does. You can customize the orientation, paper size, and paper source settings for each printing task, and even specify a different printer for each task. All of these settings are remembered so that they only need to be set once.

Note that any printer settings that use the Windows "default printer" will automatically change if the Windows default printer is changed (for instance if you install a new printer). The settings should be re-checked in any case, since the new printer may not support the same paper size or source, resulting in an improper setting.

Campground Master can support any printer that can be driven by Windows. Ink jet printers are the most common type used, and will best allow the graphics and color to be printed. If you have an older dot-matrix printer, it can still be used but you will probably have to use the simpler receipt formats instead of the Reservation Ticket format if it doesn't support the graphics well enough (for lines and various font sizes).

Default (grid-type reports)

This setting is used for everything that isn't a special format. This includes the tab views and any report that prints in a grid-type format. In some cases you will want to set this to Landscape orientation so that more columns fit on the page.

Receipt formats

You can set up different printer settings for each specific receipt format -- Reservation Ticket, Full-page Invoice, Confirmation Letter, etc. For instance, you may want to print receipts on small paper and confirmation letters on normal paper. To avoid changing paper, you can connect a different printer for each printing task (this would even allow printing of invoices and window tags at the same time, for instance).

Receipt Printer

The Receipt Printer setting is specifically for retail-type receipt printers which typically use 3" roll paper. Any receipt printer that has a Windows driver available should work with Campground Master. Most manufacturers make the Windows driver available on their web site -- call their support line if it's not easy to locate. If none can be found, you can probably use the "Generic Printer" driver, but the paper size will need to be set appropriately.

If the printer has different paper settings for fixed-length (often called "ticket") and variable-length (often called "receipt"), you will probably want to choose the variable-length option. When printing receipts, Campground Master offers two different receipt formats for receipt printers, one of which is "native font". You will probably want to use the "native font" receipt format for the best-looking output. This may depend on the printer -- modern receipt printers can print clear output with the non-native (TrueType) fonts, while older ones cannot. If you use the native font, you will need to know the name of the font and configure that through [File | Printing Options](#). This font often refers to "cpi" (characters per inch), like "ANK 15cpi" or "21cpi".

Envelopes and Mailing Labels

The most likely change needed is to set the Envelopes to use Landscape orientation and the proper paper size (e.g. Envelope - #10). Otherwise you may not see anything print on the envelope, since the default is Portrait orientation.

Mailing labels are assumed to be the typical 30-per-page mailing labels. The default printer settings will usually work, but some tweaking of the offsets in [File | Printing Options](#) may be needed.

File - Print in Black & White

This setting will make any grid-type reports print in a basic black & white format with no colors and no shading of headers. This will save ink, print faster and make printouts look better on non-color printers. This option also appears on the [File | Printing Options](#) dialog, but was also placed here for convenience.

File - Fit to Page Horizontally

This setting on the File menu will ensure that any grid-type reports don't require multiple pages in width (they may still require multiple pages in length). The downside is that reports may print in a different size text, sometimes much too small (whatever is required to make it fit). This option also appears on the [File | Printing Options](#) dialog, but was also placed on the File menu for convenience.

By default, if the standard text size is small enough to fit the report on the page horizontally then the standard size is used. In other words, the text might get shrunk but it won't be stretched to fill the page. However, there is an option to stretch the text to fit the entire width, in case you want extra-large printing. This option is under [File | Printing Options](#).

View - Toolbar

You'll see this option in the [View](#) main menu, and it controls whether the main toolbar (the large picture icons below the menu) are displayed. While most users will like the toolbar for quick access to the main functions, expert users that know the keyboard shortcuts may prefer hiding the toolbar so that more space is available for the tab views.

View - Status Bar

This option is in the [View](#) main menu. It controls whether the status bar is visible, which will appear at the very bottom of the main window. The status bar simply shows short help-hints for menu items (whatever the mouse cursor is hovering over), some progress messages (for instance, "saving database"), and the state of keys like **Caps Lock** and **Num Lock**. Its functionality is minimal, so most users prefer to leave it turned off in order to gain an extra line on the tab views.

Color Key

The Color Key has a dual purpose -- it shows you what the reservation color coding means, and also allows you to change any of the colors. This option is in the [View](#) menu, and is also available on all of the right-click context menus for quick access.

Note: The Color Key dialog is also used for the Export to Web Vacancy Grid color settings. The operation is the same as described here for reservation colors, but apply to web page colors instead of reservation status.

The Color Key dialog shows a list of reservation status conditions, and each status condition will be shown in the current colors defined for it. The list is longer than the dialog allows, so you will need to scroll the list to see them all.

To change a color for a status, first right-click on it in the list. You can change both the text color and the background color. The standard Windows color dialog is used to change colors, where you can select one of the basic colors or define your own color. To define your own color, first click on one of the empty Custom Colors boxes. Then click on the approximate color in the "rainbow box", and adjust the brightness slider control (on the right side) until the color is just right. The selected color will be updated dynamically in the box below the rainbow (Color | Solid). Then click the Add to Custom Colors button.

You don't actually have to define a custom color to use any color for a status (whatever color is in the color box will be used when you click Done). However, saving it as a custom color will allow you to easily use it later, and you can use it for other status entries.

When finished changing all of the colors to your liking, click the Done button on the Color Key. If you click Cancel, **all** of the color changes will be cancelled.

View Product Authorizations

This View menu function simply shows a dialog with your current authorizations, according to the license you have purchased. There is nothing to edit here, so it's just for reference if you are asked for it when calling for support. The authorization key is entered through the Park Setup, covered elsewhere.

Other Program Options

There are a number of other settings that affect the overall operation of the program. Since these should be set up by an administrator and not changed arbitrarily, they are found under the Maintenance menu. See *Program Options* in the *Maintenance Functions* section for details.

5 Dynamic Interactive Report Screens

Overview

The dynamic interactive report screens, or Tab Views, are the heart of the software and provide the information and functions commonly needed every day. They are "dynamic", meaning that they will automatically update every time a change is made to the database. You don't have to "generate" these reports, since they are always up to date. They are "interactive", meaning that you can work with the data directly on the report -- just right-click on the data and you will be given several operations to choose from.

Tab views consist of a grid for the report itself, plus a control area above the grid. The controls for each view are similar, with dates and quick-pick drop-down boxes for filtering the report, plus buttons and other options specific to the report. Most tab views share very similar right-click menu functions, navigation commands, and other features as described below.

To view any of the Tab Views, simply click on its "tab" (the row of buttons above the views). The selected view will show up instantly. (There may be a slight delay the first time it's accessed, but it will be much faster thereafter.) The name of the selected view will be shown in bold text so you can easily see which one is active. You can also change tab views using the **Tab** key or the Shift-function keys (see the *Keyboard Shortcuts* section for details).

Each tab view has an access level. Only the Rack view can be seen when no operator is logged in or if a Guest is logged in. A Clerk access level is required to view On Site and Payments Due, a Manager access level is required for the Transactions tab view, and a Reservations access level is required for the others (and also required to perform functions on the Rack view). Tab views that have a higher access level than the current operator will have their title shown in a light gray text, and clicking it will simply not have any effect.

Tab views will have scroll bars if the data is too large for the screen. To see the rest of the data, simply drag the "thumb button" in the scroll bar or click in the scroll bar in the direction you want to view. With the exception of the Rack, which uses uniform cell widths, the cells in the grids will auto-size to fit the text in them. Therefore each report will have varying widths depending on the length of names, phone numbers, notes, etc. for the items in the lists.

Tab views that display fields in columns may have a Totals row at the bottom. (This can be disabled in Program Options if desired). This will show the total number of reservations shown in the report, and will also show totals for any columns that are appropriate -- such as # of adults, extra vehicles, and balance due.

Common Controls and Settings

Overview

The control area above the tab-view reports allows you to filter the information to be displayed. Some of these are common to most reports and are described here. Unique controls are described with each of the reports. Since these are dynamic reports, the view will change immediately when you adjust these controls.

Date Selections

Most important is the date or date range selection -- each view has a start (From) date and most have an end (To) date. In addition to the common date-picker controls, there will be left and right buttons (arrows, "<" and ">") on each side of the dates *if your screen size is 800x600 or greater* (there isn't enough room for them on

640x480 screens). These buttons will increase or decrease the date by one day, making it easy to step through dates one click at a time. Note that when changing one date, if the other date causes a backward date range, it will automatically be changed to the same date. Thus if you increment the From date on the Arrivals tab and the To date is already the same, then the To date will automatically be adjusted to match the new From date. This makes it easy to step through single dates without changing both date-picker controls.

In addition, many reports have buttons for Today, Week, Month and Year. This makes it easy to see these common ranges with a single click. Note that the Departures and On Site views have Yes/Today instead of Today, which is an abbreviation for "Yesterday and Today", so that you can easily see these two days at once. (It's useful to see yesterday's Departures and On Site because the reports are based on the reservation's Last Night, so "yesterday's" customer may not actually check out until today.)

Site Type, Class and Park Selection

The Site Types drop-down list limits the reservations or sites in the report to a specific site type, site class or park (if you have more than one Park record defined). The default is All Site Types, but you can select a single Site Type to view, or in some cases you can view all Assigned Sites (i.e. reservations for which a site has been assigned) or all Unassigned sites.

The drop-down list actually has a few different parts to it:

General selections -- The first part of the list will have the general selections like All Site Types, Assigned Sites and Unassigned Sites (as appropriate). These are a simple way to reset the selection to show all sites or all assigned/unassigned sites.

Site Types -- Each site type defined will be listed, in the order defined in the Site Types Pick List. Selecting one of these will limit the report to only sites of that type

Site Classes -- After a "-- Classes:" divider, the site classes will be listed as defined in the Site Class Pick List. As with site types, selecting one of these will limit the report to that site class. Classes are generally defined as being more general than since types, and thus one site class could include sites of several types.

Parks -- If your database is set up for more than one Park (an added-cost feature), there will be an additional section for selecting a single park. This will show all sites in that park, regardless of type or class.

Filters -- In addition to selecting a single type or class (or park), you can define an Advanced filter. You can also set up a Default filter, which is the same as an Advanced filter but will be used as the default selection for this report every time it is "reset" (with the Reset or Today button, for instance). Both of these functions use the Site Filtering Dialog.

Important -- if a Default filter is defined for the Rack view, this will also be used for the default when making a New Reservation.

Site Filtering Dialog

The Site Filter dialog is used in many reports to select specific filtering by individual site, site type, site class, or park. This allows you to filter the sites to be included by more than one condition at a time, for instance you can include 2 or more site types at once, or 2 or more classes, or sites of a specific type in a specific park.

The dialog will have 3 or 4 lists on it -- Sites, Site Types, Site Classes, and Parks (if you have multiple parks in the database). Each list is a multiple-selection list, so you can pick one or more from each list (use Ctrl-Click to select multiple entries). If a list has nothing selected, that's the same as selecting all of them (i.e. no filtering is done for that field). To start over and clear the list so no filtering is done, you can click the Reset Filter button

Note that in some cases there will be a "(no site)" entry at the bottom of the lists, which allows you to select reservations that have no site assigned, or transactions that are not bound to a reservation, for instance. Some reports don't allow selecting unassigned sites (for instance the Occupancy Report), so this won't be an option when filtering for those reports.

Be careful about selecting items from more than one list at a time, since the filtering uses "AND" logic -- for instance if you select an "RV" site type and a "Boat" site class, then it would only show a site if it's an "RV" type and it's a "Boat" class. This which would probably result in an empty report. If you want to show RV's and Boats together, then select both criteria from the same list -- either type or class, as appropriate.

Report Options

Most tab view reports (all but the Rack view) have an Options button. This is generally used to select which fields are displayed in the view. These settings are remembered, even after the program is shut down, so you only need to set them up for your requirements one time, and change them only when needed for a special printout, for instance.

Field Selection

Most reports allow you to select what fields are shown. Just check the fields you want to see on the report from the options available. The fields available for a given report are based on the way the report is commonly used -- for instance, there's no reason to see the customer's vehicle information on a transaction details report. Also, some fields are always shown and cannot be turned off. The order of the fields cannot be changed.

Include empty sites when sorted by Site

This is selected by default, and will show the vacant sites on the report in addition to occupied sites. This is handy for using the On Site report for a walk-around checklist, as it clearly shows which sites should be empty.

Include Waiting-List reservations

This option appears on some reports, such as Arrivals, so that you can see if any reservations "would have arrived", useful as a reminder if you want to double-check for openings for the coming week, for instance.

Show reservations which fall in the date range

This option on the Unassigned and Non-Reserved reports, selected by default, will show any reservation that covers the selected dates, even if it started (or will start) earlier than the start date.

Pop-up Tips

Whenever your mouse moves over the grid in a tab view, you will likely see a variety of little pop-up messages. These are tips that give you a little more information, so that the grid can be smaller and still have the information easily available. For instance, putting the mouse over the last name of a customer will pop up their first names as well. If you hover over a Site name, the site's Description will pop up. And if you hover over the date headers on the Rack view, the full date will be shown if it's not already part of the header (e.g. if you turn off the options to show the Day of Week or Year in the header). Note that these tips will stay on the screen for a few seconds, and will disappear until the mouse is moved again.

In addition to these pop-up tips when hovering, you can get detailed reservation or site information in the form of Quick-Info windows when double-clicking on a cell. If a reservation occupied the cell, you will see almost all of the reservation's details. If you click on a cell with a site name or type (for instance the site headers to the left of the Rack), the Site's details will pop up. To close the Quick-Info window, just press the **ESC** key, or click anywhere outside the window, or click the "X" button in the Quick-Info window.

Right-Click and Double-Click Functions

Much of the functionality of the program is available through the right-click context menus of the tab views. (In fact, many functions can **only** be done through the right-click menus.) This makes working with reservations extremely fast -- see it, click it, and it's done (in many cases).

When you right-click on a cell in the grid, a menu will pop up with operations available for the item you clicked on. This menu will be appropriate for the cell you click on, so it will change depending on which view you are on and which item you click on -- for instance, depending on whether it's the customer name, the site name, a blank cell, etc. Many times you will see one or more of the menu items "grayed out" (disabled). This means that some functions are not available for that cell due to its current state. For instance, you can't cancel a checked-in reservation, so that option will be disabled. You will also see some options change depending on a reservation's status. The software attempts to prevent illogical or impossible operations. See below for an explanation of the functions available through the right-click menus.

Double-Click Functions

In addition to right-click, you can double-click on a cell. There are two possible results of double-click. On an "open" cell in the Rack (a site that's available for the date clicked on), double-click will open the New Reservation dialog, with the site and date already filled in. This is the quickest way to start a new reservation if you can see the desired site and starting date in the Rack view. The other double-click function is to show a Quick-Info window for the selected reservation or site. This will happen for any double-click other than on open cells on the Rack. The Quick-Info window is a temporary window (just click somewhere else or press the **ESC** key to close it), but it shows most information for a reservation and in some cases will show information not available elsewhere, such as any conflicting reservations for that date.

Right-Click Menu Functions

View Reservation Quick-Info and **View Site Quick-Info** -- These are often the top selection in the menu, and are the same as double-clicking on the cell (opens a quick-info window).

Reservation Details, **Customer Details**, and **Site Details** -- These open the respective Details dialogs, where you can view and/or edit any of the corresponding details. Note that Manager access is required to change the Site Details.

Find all Reservations for the Site -- This will open the Find Reservation dialog and show all reservations for this site (past, present, and future). This can be handy for seeing who the last person was in the site, or for seeing when the next person is due to arrive, if it's too far in the past or future to see on the rack. From there you can check the Reservation Details for each one.

Search Grid for Site/Customer -- This is the same as the Search icon on the toolbar and the **Alt-S/F9** function keys. It will open the Search prompt where you enter the site or customer name to search for.

Change Customer for the reservation -- This is only available if the reservation is a Group reservation and is not yet checked in. This can be used to change the reservation from the group name to an individual customer before they check in.

Check In and **Check Out** -- These will let you instantly check in or check out a reservation. If today's date doesn't seem to match the first or last night of the reservation as appropriate, you will be warned and given the option to change the date in the reservation to today (handy for early check-ins or check-outs). The Transactions dialog will appear so that you can review the customer's bill and adjust it as needed or print a receipt.

Transactions -- This will open the Transactions dialog and allow you to view transactions or enter new transactions for a reservation. See the section *Working with Reservations* for more information.

Confirm, **Guarantee**, or **Cancel Reservation** -- These do exactly what they say, opening an appropriate dialog as needed.

Assign or Change Site -- This will open the reservation dialog and allow you to assign a new site to a reservation, whether it already had a site assigned or not.

New Reservation for this customer -- This will open the New Reservation dialog for making an additional reservation for the same customer. The customer information will already be filled in. This will not affect the current reservation, and is handy for making future reservations for a current customer.

New Reservation -- (Rack view only) -- This option is available if you click on an open (available) site cell on the Rack view. It is the same as double-clicking on the cell, and opens a New Reservation dialog with the site and start date already selected accordingly.

Add Concurrent (Linked) Reservations -- This will open the New Reservation dialog, but is used to add additional sites to the existing reservation. For example, use this to add more sites to a group reservation, or to add a trailer storage site to a reservation. Basically you will just choose additional sites and leave the rest of the information as it is. The new sites will each have a reservation record generated for them, but they will be linked to the same reservation and the only difference will be the assigned site.

Split Reservation at this date -- (Rack view only) -- Use this to make two reservations out of one, where one reservation ends the day before the date you clicked on, and the other begins on the date you clicked on. This is useful if you want to move a customer to a new site in the middle of their stay (split it, then use Change Site on the new half), or if they will leave for awhile and come back later (split it, then change the start date of the new half). If the split date is today or in the future, the second half will not be checked in yet (it will show a Pending status). If it's in the past, then both halves will keep the checked-in status (assuming it's checked in now). Note that a split must be done in the normal range of the reservation, not in a Blocked date range.

This is New Start / Last / Blocked Date -- (Rack view only) -- Use one of these three options in current or future reservations to quickly change the reservation dates right on the rack.

Remove Blocked Dates -- (Rack view only) -- If you click on the last date of a blocked range, you can use this option to completely remove the blocked dates from the reservation.

Extend Previous Reservation to this date -- (Rack only, on open site cells) -- Use this to easily extend a reservation (the one immediately preceding the selected cell in the rack) to end on the selected date. It will add days to the end of the reservation resulting in a longer reservation, rather than change the reservation's start date.

Block Previous Reservation to this date -- (Rack only, on open site cells) -- Similar to Extend Previous..., this will add Blocked dates to a reservation (e.g. when you know that the customer might stay until this date but isn't sure yet, and doesn't want to be charged for the additional days yet.)

Advance Next Reservation to this date -- (Rack only, on open site cells) -- This will change the start date of the next-in-line reservation on the rack to the selected date. (It will add extra days to the front of the reservation, not change the end date.)

Make Site Available / Unavailable this date -- (Rack only, on open site cells) -- This will add or remove dates to the site's dates-unavailable or dates-available list as appropriate, changing the "available" status of the site for the selected day. This can be useful for scheduling short periods of maintenance on a site, or to indicate that a site was not available due to an emergency or electrical problem (even if it's a date in the past, this can be worthwhile for accurately calculating Occupancy reports). For longer changes in periods of availability, it may be easier to enter the date ranges manually in the Site Details dialog.

Print for this reservation -- (Any view, if right-clicking on a valid reservation cell) -- This allows you to print either a single receipt or an envelope for the selected reservation. (The receipt format can be selected from the dialog that appears).

Print this view -- This is the same as using the Print icon, or **F8**, or File / Print from the main menu. It is here primarily for consistency.

Print for all reservations -- (all but the Rack and Transactions view) -- In addition to "This View", which is the same as Print this view above, this has options to batch-print mailing labels, envelopes, or receipts for all reservations shown in the current view. (They can also be filtered further if needed, or you can select which ones to actually print, in the dialog that comes up.)

Conflicting Reservation Details -- This option will only appear for conflicting reservations (reservations occupying the same site on the same date), and will be one of the few functions available in that case. This will show a list of all reservations conflicting with that particular site (using the Find Reservation dialog), so you can edit one or more of them as needed to fix the conflict.

Color Key -- This displays the Color Key dialog so you can see the meanings of the reservation status colors, and to change the colors used.

Grid Lines -- This will turn the grid lines on or off. A check mark will be shown next to the menu item if the grid lines are currently on.

Flip Orientation -- (Transactions view only) --When showing Summary reports on the Transaction view, you can flip the orientation so that dates are in rows and the category summaries are in columns. This preference will likely depend on how many dates or how many categories you are summarizing. The transaction orientation isn't saved in general, but will be saved with any "memorized" transaction reports.

Searching Reports

You can search for a particular Site or Customer on any of the tab views by pressing **F9** or **Alt-S**. In some cases (e.g. when clicking on empty cells in the Rack view), you can also use the Search function from the right-click menu.

The main uses for this are to quickly scroll to a desired site on the Rack view, or to locate a site or customer on the other views.

When you press Alt-S, a small dialog will appear -- just type any portion of a site name, or the start of a customer's last name. It will first search for a site name containing the characters you entered (it will search both the abbreviations and the "Site Name" fields). If no match is found, it will then look for a customer. So for instance if you're looking for a customer with "Smi" in the last name but you have a cabin named "Smiley's", it will match the cabin first.

Either way, if a match is found then the view will highlight the matched reservation (scrolling to it if necessary). In the case of the Rack view, a match of the site name will highlight the first visible cell of the site and a match of the customer will highlight the first cell of the reservation. (Note that it will only search reservations from today to the last date of the Rack that can be scrolled to, corresponding to the Maximum Future Days setting.) On any of the other views, when a match is found the entire line will be highlighted.

Sorting Reports

All of the views except for the Rack view are tables where each line corresponds to a record and each column is a field of the record. The fields shown by default are appropriate for the selected view (use the Options button to change which fields are shown). By default they are sorted by date or other appropriate field, and whenever sorted by date there will be a blank line inserted between each different date for ease of reading the report.

You can have the report sorted by any field you like, simply by clicking on the column header for that field. A small arrow will be shown in the header, indicating the direction of the sort. If you want to sort the column in the other direction, click the header again -- each click will reverse the sort for that column.

Some views have an option (under the Options button) to include empty sites when sorting by Site. This provides better visual feedback for "empty" sites and is especially useful for walk-around checking, but also makes the report longer.

Blank separation lines will only be used when sorting by date (and some other cases on Transactions). Also note that in certain cases, the program will automatically use a secondary sort. For instance when sorting by Site Type, all of the reservations with the same Site Type will then be sorted by site, and those on the same site will further be sorted by date.

Sizing Reports

As covered in the *Rack Options* section, the Rack view cells are a consistent width determined by the Cell Width setting. The other reports, which are columns of data fields, are auto-sized according to the text in the fields (the cells will grow as needed to avoid truncating the text). However, you can have temporary control over the cell widths if you want to adjust the report for printing. For instance, if you don't need some of the fields or if some columns are blank for all records, you can save space by shrinking those fields to almost nothing. This may reduce the number of pages needed for wide reports, or allow the font to be larger when using the "Fit to Page" print option.

To resize the columns, place the mouse cursor over the dividing line between the column header cells. The cursor will change to a right-left arrow (similar to this: ←→). Then hold the left mouse button down and move the line to the width you desire. You can change the columns to any width, but be aware that this will likely result in truncating text, and since the ellipses (...) will not appear for text on these reports, there is no indication that part of the text is missing.

As mentioned, the resizing is temporary. It will remain the new size for printing or scrolling around, but any action that causes the report to refresh, such as sorting a column or making any reservation change, will cause all of the columns to auto-size again.

Printing Reports

To print the contents of any Tab View report, simply click the Print button on the toolbar (or select File | Print from the main menu). There are several options that can be used to customize the format of the reports, which are described in the *Printing Options* section of *Program Options and Settings*.

Besides those options, don't forget that you can print in Landscape mode to get a wider report on one page. To change to landscape mode, use File | Printer Setup | Default. The setting will be remembered even when the program is closed and restarted.

It's worth mentioning again that you should use Print Preview to see what the report will look like before printing it. This is because the size of the report and the settings (Fit to Page and Zoom Percent) can make the difference between getting a nice report or getting 20 pages that have to be taped together, or a report printed in such tiny text that it's unreadable. The Print Preview function also allows you to step through pages to see what's on each page, so you can select certain pages to print if you don't need the whole report.

If you prefer to print in black & white to save ink (or if you don't have a color printer), it may be a good idea to add the "Status" field to your reports, since the printout won't have the color coding. This is an optional field under the Options button on all views (except the Rack).

Once you select Print (either after Print Preview or instead of Previewing), printing uses the standard Windows print dialog. This allows you to select the page numbers to be printed, which printer to use, and other printer properties. Generally this only requires you to click OK on the Print dialog to send it to the printer. There is no need to wait for the entire document to finish printing -- once it is queued up for the printer, the print dialog will close automatically and you can continue working or print another report.

Exporting Reports to Other Programs

Any of the Tab View reports, as well as almost any report grid in a dialog such as Find Customer, can be exported.

Copy/Paste

You can also copy data directly to another program such as Excel, just by highlighting the desired cells on the grid (or press **Ctrl-A** to select all cells), then **Ctrl-Insert** or **Ctrl-C** to copy the data to the clipboard. Then you can switch to the other application and paste the data. The data is copied in Tab-delimited format, so it can be pasted into nearly any program that supports Tab-delimited data or text. However, only the data cells can be copied this way, not the header row and column. To get the entire report into another program, use the Export to CSV function.

Export to CSV

Exporting reports to a CSV file is covered in detail in the Import and Export Functions section later in the manual.

Rack (Reservation Grid)

Probably 90% of your operations will be done directly from the Rack view. This is the primary display, which shows the status of each site on any given date, typically showing the next 2 weeks. Reservations and open sites are color-coded to indicate their status, and each day of the week on open sites can be colored differently as desired (by default the weekends are slightly darker). Each cell in the grid represents one day of one site. There are several options available to customize the look of the Rack (see *Rack Options* for explanations), and there are controls at the top to filter the view.

Red Yesterday/Today Divider Line

You will see a red line on the Rack between yesterday's cells and today's cells on the Rack. Normally this is a vertical line, but may be horizontal if the orientation is flipped. The purpose of this line is simply to indicate the start of current day, and is a very helpful indicator.

Note that by default the first column shown on the rack will be yesterday. This is so that you can see reservations that ended last night, since those customers are likely to still be on site in the morning. You can also tell (by color coding) whether they have been checked out yet, so you can tell that they might still be there. When scheduling new reservations, you may want to avoid placing someone in the same site as a reservation that "ended" yesterday unless they have checked out, in case they plan to extend their stay (or just haven't left yet, in the case of early walk-in customers).

Reservation Cells

Reservations are shown as cells filled with the last name of the customer. If the name is too long to fit, it will be truncated with an ellipsis (...) to indicate that it's not completely visible. One cell will be filled (with the same name in each cell) for each *night* of the reservation. The program deals in "nights" stays, so although most customers will actually leave the morning after their last night, the cell for the departure morning will not show that customer -- it must be available to show the customer staying the following night. Thus if a customer stays for one night, one cell will be filled with that customer's name.

Moving the mouse cursor over any reservation (without clicking) will show the full last name as well as the first name(s) in a pop-up tip. Double-clicking on a reservation will pop up a Quick-Info window with all of the major details of the reservation, including the dates, status, and customer information, plus linked sites, notes, site preference requests and more. Finally, right-clicking on a reservation will present a menu with all major functions available so that most operations can be done from this view. These functions are covered in the Common Controls section.

Occasionally you will see a cell that is dark blue -- this is simply the grid "cursor", indicating the selected cell, and results from clicking on the grid or pressing **Alt-G**. This selection will be moved if you click on another cell, and will disappear if you right-click on a cell or change to another view. In any case, it's harmless and not part of the report (it will not show on a printed report).

Pay special attention to conflicting reservations -- these are cells that are bright red with yellow text (this is the default colors, but this color can be changed like the others through the Color Key). Although it's very difficult to make a reservation that conflicts with another one through the normal procedures (the program will warn you and not allow it), it may be possible to cause conflicts by manually changing a reservation's data (for instance through the Maintenance functions). If you see a conflicting reservation, double-click on the cell to see a Quick-Info window showing the information for both of them. You can edit the first one with the normal right-click commands, but to edit the second one you may have to find it through one of the other views (for instance, Arrivals for that date).

Open Site Cells

Cells with no customer name are "open" sites. The color may vary depending on whether the day is a weekday or weekend, and whether the site is available on that date (according to season dates or special available/unavailable dates set for the site). Hovering over an empty site won't show anything, but you can see the site's description (and double-click to get a Quick-Info window) by hovering over the site name in the row or column header (the gray button-like cells). Double-clicking on an open site will open the New Reservation dialog (the quickest way to make a reservation for a known site and date that's visible). Right-clicking will pop up a menu with functions for the site, including options to extend or advance preceding/following reservations to this date.

In addition, you may see "No Site:1" (or some other number) in a cell that should otherwise be open. (If the number won't fit in the cell, you will see the ellipsis and can hover over the cell to see the full number.) This indicates that there are reservations for this date which have not been assigned sites, and this will appear in every open site cell for each date that has unassigned reservations. This is essentially a warning that you should not fill the open sites for that date until the unassigned reservations have been assigned sites, or that you should at least leave enough sites open to satisfy the unassigned reservations. To assign sites to the reservations, you should go to the Unassigned Tab View, where they will be listed. (It can't be done from the Rack because the reservations aren't assigned to any particular cell, therefore you can't right-click on any particular unassigned reservation.)

A reminder about double-clicking to make a reservation (or the equivalent New Reservation function from the menu or toolbar) -- be aware that this will make a *new* reservation, even if you select an existing customer from the database. This is *not* the way to assign sites to reservations that have already been made without site assignments, since the original reservation without a site assigned would still be in the system.

Rack Controls

Date range selection was covered in the *Common Controls and Settings* section above, but the dates on the rack have some special meanings since it's not a normal table-type report.

You'll notice that the program starts with both the start and end date set to the current date, but obviously the Rack is showing more than one day. The date range is of primary importance when the Available Only option or the Show Range option is selected, but the controls can also be used to change the Rack dates shown.

The default date range available in the Rack is determined by the past and future minimum days and maximum days settings (see *Rack Options*). You can use the date controls to see dates further in the past or future -- just change the date in the control to extend the range of the Rack. This won't necessarily scroll the Rack to the dates selected, especially when selecting the End date -- you will still need to scroll the Rack view after selecting a new end date.

If the Available Only option is selected, then the Rack will only show those sites that are available continuously from the Start date to the End date selected. (Options for what is considered "available" are covered in the *Program Options and Settings* section.) So by default, if you check the Available Only box, it will show all sites that are available today. This is a quick way to see what's available for a given date range before starting a reservation. Once you know the available sites, you could double-click on one of them to start the reservation process.

If the Show Range option is selected, then the Rack **does** only show dates in the range selected. This is primarily used when you want to print a Rack view, so that you only print the dates you want. Otherwise it would print all of the rack currently available for scrolling, which is probably a lot more than you want.

The Site Types drop-down will filter the Rack to show only the selected type or class, or All Site Types. Note that this also affects the Available Only option, in which case only the available sites of the selected type will be shown. Also note that if a Default filter is defined, this will also be used for the New Reservations dialog.

The Reset/Today button is handy for resetting the Rack to its default state after scrolling it or checking availability. This sets the date range back to the default, makes sure that the current day (or previous day depending on the settings) is the first row or column shown, clears the Available Only and Show Range options, and resets the Site Types selection to All Site Types.

The Options button opens a dialog with various settings for customizing the appearance of the Rack. These settings are saved and will remain the way you set them every time the program runs.

Rack Options

All of these options are used to affect the way the Rack is displayed (the main dynamic interactive report screen). A description is given here of each option, but more information may be found in the *Rack (Reservation Grid)* section. Note that they also affect the mini-rack view on the **New Reservation** dialog.

Dates on Top -- This is the normal orientation for the Rack. If you prefer it with Sites across the top and dates down the side, then uncheck this option.

Show Day of Week in header -- Controls whether the day of the week (Mon, Tue, etc.) is shown for each date header cell. While this can be helpful, it does take extra space on the grid.

Show Year in header -- Controls whether the year is shown for each date header cell. Helpful if you do a lot of multi-year reservations, but most users leave it off to save the grid space.

Show Site Types header -- Controls whether the site type is shown next to the site name in the grid. This can be useful if the site names show no clue as to their type, for instance if they are all just numbers.

Minimum future days -- This defines how many days in the future will be available for instant scrolling on the rack, regardless of future reservations. In other words, a value of 31 will allow you to scroll over to see at least 1 month in the future, without having to change the End date in the header. Note that the actual number of days shown may be greater (up to the maximum, below) if there are reservations beyond the minimum future days value.

Maximum future days -- This defines the maximum number of days shown for instant scrolling, regardless of what future reservations are defined.

Maximum past days -- The maximum number of days in the past that will be available for instant scrolling, before the Start Date must be changed in the header. (This is also the minimum past days shown.)

Note that the 3 settings above don't limit the ability to view or create reservations. They only help minimize the number of cells in the Rack that the program needs to keep visible under typical usage conditions, to increase response speed. If your computer is fast enough, there is no reason you can't set these to show a full year in each direction by default, so that you rarely have to change the dates in the header and can simply scroll to the desired dates.

Cell Width -- The default cell width for the rack is 50 (measured in pixels, or "screen dots"), so that the date header will display fully. While this allows the most possible grid cells to be shown at once, it may truncate more of the customer names than you prefer. You can increase the cell width to see more complete names. A good medium value is 55, which will allow most common names to fit and still allow nearly 2 weeks to be shown at once on screen with 800x600 resolution. Alternatively, you can reduce the cell width to get a "compressed" view. For instance, set it as low as 3 to see several months at once. This would most likely be a temporary setting, due to the time it takes to display and the lack of names & date information. (Dates will be compressed as the size is reduced, but after a point it can't show date headers). However, the pop-up tips on both the date headers and an occupied site cells will still be shown.

Start Rack with yesterday by default --For convenience in seeing who might still be in the park, this option is enabled by default so that the Rack shows yesterday as the first column. A red line separates yesterday from today as an indicator, and to help avoid making new reservations on the wrong date. If this becomes too confusing or you just don't need to see who was on site yesterday, you can turn this off so that the rack starts on today.

Note: The From and To dates on the rack are not affected by this option -- they will still default to today, so that the Available Only function only shows those available today. This can create a slight bit of confusion when using the date-stepping buttons (the arrows on each side of the date). Stepping back one day won't change the first column of the rack, since it's already showing yesterday. On the other hand, stepping forward one day will appear to jump 2 days because the rack will now go from starting yesterday to showing tomorrow. It makes sense when you consider the actual dates selected, but may be a little confusing at first.

Show bars at the start and end of reservations -- This option (enabled by default) helps you visually separate back-to-back reservations by drawing a small vertical bar at each end of a reservation on the rack. This can be especially helpful if you print the rack in back & white. If you don't need the bars and prefer a "cleaner" look, you can disable this function.

Show Unassigned reservation counts in open sites (e.g. "No Site: 4") -- By default, any reservations made without a sites assigned to them will show up on the Rack as a "No Site" notation in *open* site cells for the corresponding dates. This serves as a reminder that there are some reservations on that date that still need sites assigned (so don't fill in all available sites with other reservations!). To see the details on these reservations, you need to go to the Unassigned tab view. However, you may prefer to turn this notation off just for aesthetic reasons, for instance if your normal practice is to leave reservations unassigned until they arrive and checking the Unassigned list is part of your normal routine.

Hide a site if it's unavailable for the entire shown date range -- This option allows you to minimize the number of sites listed in the rack, showing only those that are available for at least part of the date range shown. This can be particularly useful if some sites are only available during certain seasons, or if a large number of sites are currently unavailable for an extended time due to renovation. See the Sites Setup Dialog section in Maintenance Functions for more information on season dates and special dates.

Arrivals

The Arrivals view shows all reservations with the First Night in the selected range (defaulting to today, but this is easily changed with the controls). This view is handy for seeing who is due to arrive today. When a camper arrives you can quickly go to this list, verify that they have a reservation, and check them in directly from the list (using the right-click menu). Toward the end of the day, you can refer to this list to see who has not arrived, or perhaps who has arrived but did not get checked into the system. You'll notice that the Name column (the customer's last name) will be color-coded according to the reservation status just like the Rack view. This gives an instant indication of their status at a glance, so you can see which reservations have been checked in.

There's a special control at the top, Pending Only, which when selected will limit the list to those who have not yet checked in. This is handy if you have a large number of arrivals for the day, so the list will shrink as you check people in. You could also use this option to create a no-show list of people you need to call at the end of the day for a status update. Note that Day passes will not be shown as pending since they are assumed to be checked in automatically.

There is an option (under the Options button) to include empty sites when sorting by Site. This provides better visual feedback for "empty" sites and is especially useful for walk-around checking, but also makes the report longer.

Note that reservations on the Waiting List can also appear on this report (if this option is set under the Options button). These will be highlighted with * *Waiting* * in front of the customer name.

You will also see reservations with unassigned sites on this report, which will show "(No Site)" in the Site column.

Departures

The Departures view shows all reservations with the Last night in the selected range (defaulting to yesterday and today, adjustable with the controls). This view makes it easy to see who might be leaving today. (Yesterday is shown as well as today, since those whose Last Night is yesterday will likely check out this morning.) You can switch to this view when somebody checks out, quickly find their reservation and check them out of the system using the right-click menu. If most of your customers pre-pay rather than checking out when they leave, you can use this report to get a list of people who should be leaving today, print it out and make the rounds to check to see if they have left as scheduled. You can then check them out to "close out" the reservation.

There is a special control at the top, Pending Only, which when selected will limit the list to those who have not yet checked out. This is handy for shrinking a large list to show who has not yet left the campground, or to show what sites still need to be checked for vacancy on the next rounds. While the Name column is color-coded to show which reservations have been checked out, the Pending Only option is still useful if you are printing in black & white mode, and of course to reduce the length of the list. Note that Day Passes will still be shown since they are assumed to be on site any time during the day (they don't "checked out"). They can be excluded by selecting "Assigned Sites" from the Site Types list.

There is an option (under the Options button) to include empty sites when sorting by Site. This provides better visual feedback for "empty" sites and is especially useful for walk-around checking, but also makes the report longer.

Note that reservations on the Waiting List can also appear on this report (if this option is set under the Options button). These will be highlighted with * *Waiting* * in front of the customer name.

On Site

The On Site view shows all reservations that occupy sites for dates in the selected range (defaulting to yesterday and today, which shows any customers that may currently be on-site). The report is sorted by the site by default. This view is primarily used as a quick reference to who is currently in the campground (especially with Current Only selected, see below). It's handy if you need a list for security gate or walk-around purposes, or if someone calls the office looking for a customer. By changing the dates you can see future occupancy, so for instance you could use it to get a list of all campers who will be here on a holiday.

There's a special control at the top, Current Only, which when selected will limit the list to those who are currently checked in (eliminating those who have not yet arrived and those who have already checked out). This will result in a more accurate report of who is actually present. Note that Day Passes will still be shown since they are assumed to be on site any time during that day and do not check in or out. They can be excluded by selecting "Assigned Sites" from the Site Types list.

There is an option (under the Options button) to include empty sites when sorting by Site. This provides better visual feedback for "empty" sites and is especially useful for walk-around checking, but also makes the report longer.

Note that reservations on the Waiting List can also appear on this report (if this option is set under the Options button). These will be highlighted with * *Waiting* * in front of the customer name.

Unassigned

The Unassigned view shows all reservations that have not been assigned to specific sites. As with the other views you can specify a particular date range. However, this view defaults to a 1-month view (from today to 31 days later) so that you can easily see upcoming reservations that need to be assigned to sites. Their rig information and any special requests (site preferences) are shown to make the task easy. You can assign a site to a reservation by right-clicking on the reservation line and selecting Assign Site (see *Working with Reservations* for details).

Note that the date range can be applied to either the First Night of reservations (only showing reservations which start in the date range), or to reservations' entire stay (showing any reservations which include the date range). This is an option under the Options button so you can set it either way.

It's common to have reservations on the Waiting List with unassigned sites, so those can appear on this report as well, if the option is set (see the Options button). These will be highlighted with * *Waiting* * in front of the customer name.

Non-Reserved

The Non-Reserved view can show three different types of reservation records that are not actually "reserving" space. These can be:

- Cancelled** reservations (either you or the customer cancelled a previously pending reservation)
- Couldn't Book** reservations (they tried to make a reservation but you were full so they won't wait).
- Waiting List** reservations (you didn't have a place to put them yet but they still want to stay).
- Inquiry** "reservations" (they just inquired but did not make a reservation).

You can also show "All Not Reserved" to show all three types in one report. Both the color coding and the Status column will indicate which type they are.

Note that the date range can be applied to either the First Night of reservations (only showing reservations which start in the date range), or to reservations' entire stay (showing any reservations which include the date range). This is an option under the [Options](#) button so you can set it either way.

By default the display shows only Waiting List reservations, since those still have the potential of being turned into a booked reservation. Like the Unassigned view, this view defaults to a 1-month (31-day) date range so that you can check ahead and call customers if a site opens up. The other types are selected using the drop-down list on the right end of the controls above the grid.

The other types of non-reserved reports are mainly useful for historical purposes (e.g. to see if any reservations have been cancelled for the week, or how many couldn't be booked). They may also be useful if you want to "un-cancel" a reservation (the customer changed their mind), or if a couldn't-book customer calls back to see if anything opened up and you can book them now. You should change the status of the original reservation instead of making a new reservation for the same customer (and probably the same dates). This way your statistics for the Unfilled Reservations Report won't show reservations that were actually filled later

To un-cancel a reservation, simply select [Un-cancel](#) from the right-click menu. (Manager access is required.)

To change a couldn't-book reservation into a booked reservation, use the [Assign Site](#) function from the right-click menu -- the couldn't-book status will automatically be cleared once a site is assigned. If you wish to re-book the reservation without assigning a site, use [Reservation Details](#) and simply uncheck the Cannot Book box.

Payments Due

The Payments Due view shows any reservations that might have outstanding payments due, as of the selected date (defaulting to today). Whether payments are due is primarily determined by the Paid-Through Date for reservations, so it's important to make sure that each reservation's Paid-Through Date accurately reflects the payment status. (This field can be easily set every time a transaction is made and the customer checks in or out.) You can filter it further with the options available through the [Options](#) button (see below).

By default the report is sorted by the Paid-Through date of the reservation, so the most-overdue accounts are at the top. If the customer has not made any payments (i.e. their Paid-Through Date is blank), the date shown here will be the reservation's First Night, and will be shown in parenthesis to indicate that no payments have been made. You might also see "(Deposit)" if they have made a deposit but no further payments, or "(Payment)" if they have made a payment but no Paid-Through date was set. Unlike most other date columns on reports, blank lines don't separate the different Paid-Through dates. This is because it would usually result in many blank lines, and the date grouping is not important for this report.

The report also shows these special fields:

Reservation Balance and **Customer Balance** -- These are according to the charges and payments applied to the reservation or customer. (Depending on the filtering options, they may have a \$0.00 balance even though a payment is due, e.g. for the next month.)

Days Overdue -- This is the number of days since the last Paid-Through date (or their First Night, if they have not paid yet).

Unpaid Nights -- This is calculated as the number days from the last Paid-Through date (or First Night) to the end of their reservation (not including Blocked dates). Thus this is often larger than the days overdue for extended-stay customers, and smaller than the days overdue in most other cases

Note that the date selection for this report is a single "Show any due as of" date, rather than a From/To range, since a range doesn't make sense for this report. Thus changing the date or using the Week/Month/Year buttons can be used to show payments that are coming due in the future.

There's a special Show All With Balances option on this report, which will show any reservations with non-zero balances due (unpaid charges on their transaction history), regardless of their Paid-Through date. Reservations with zero balances will also still be shown if they are shown according to the Options. This is handy to see customers that will owe something in addition to their reservation stay when they check out, or any other case where they haven't paid their full balance even though the reservation has been marked "paid" according to the date.

The Options button has a variety of options for selecting which reservations will be shown in the report, in addition to the list of fields to show. You can select criteria for showing pending, checked-in, and other reservation statuses. This can be based on whether there is a balance due for any status. For pending reservations, you can filter based on how long ago the reservation was made or how soon the reservation starts (in case you have prepayment/deposit requirements). You can also filter by balance due (either Customer or Reservation balance) and whether they have made any payments yet. For checked-in reservations, you can filter on how long it's been since their last paid-through date or how soon their paid-through date is coming up (to show long-term residents that require monthly payments, for instance). All of these selections will be kept until you change them, even if the program is shut down.

Transactions

Overview

The Transactions view is different in many ways from the other views. The most obvious difference is that this view shows a list of transactions rather than reservations, and since each reservation is likely to have multiple transactions, a single reservation will result in multiple lines in the transaction list. This view has more filtering options and shows more totals and sub-total information than other views.

Some reservation information is shown for reference and sorting convenience -- the last name is color-coded as usual, plus the first names, site, site type, and first night are shown. Also note that some transactions won't have reservations associated with them, and some won't even have customers associated with them. This will be the case for unbound transactions, as well as any Expense and Misc. Income transactions that you enter for the business.

The other major feature of this view is that it can be used to generate many different summary reports. This makes it much more powerful than the other views -- and much more complex as well. For a better understanding of how to use this report, refer to the *Working with Transactions* section as well.

One thing to remember is that like the other reports, this is a dynamic report. So whenever transactions are made, they will show up immediately. This is a good thing, unless you are showing many days of transactions (or a summary report) and have a slow computer. Although it will only refresh when the view is visible so it won't slow down normal operations, it would still be a good idea to reset the view to Details mode for Today (uncheck the Summarize option and click the Today button) after getting the reports you need.

Detail Transaction Reports

This is the default mode, and is indicated by the Summarize check box being unchecked. Each line will show a separate transaction record (with subtotals as appropriate, described below). You can select which fields are displayed through the Options... button (or the separate "Detail Options..." button if your screen resolution allows).

Dates

By default, the view shows today's transactions, sorted by date (and time, since they are all the same date). Since all transaction types are shown, the charges and the payments would balance out to a \$0.00 total at the bottom if all charges and payments entered today correspond to each other. This is often not the case, however, since charges are often posted to a reservation on a different day than the payments.

If you prefer to show transactions by the date of their reservation (to make it easy to check for reservation charges and payments balancing out), you can change this in the Filters dialog. Click the More Filters... button in the control area, and check the option to Use Reservation date instead of transaction date. Now the transactions will be grouped by the date (First Night) of the reservation, and the total and subtotals (if any) should balance out for any reservations that are paid in full.

As with other reports, you can select the start and end date for the report. (If you're using the option mentioned above to Use Reservation Date, then the date range filtering will likewise apply to reservation dates rather than transaction dates.) Since you're likely to have many more transactions in a day than reservations (and you should have no transactions for future dates), there are no Week/Month/Year buttons. To get monthly, quarterly and yearly reports, see the Summary Reports section coming up later.

Sorting and Totals

You can sort the detail transaction list many ways by clicking on the column header as in other reports. You will notice that sorting by some fields will result in groupings with sub-total lines between each group. This provides a quick way to get mini-summaries for Transaction Types, Categories, Pay Methods, Discounts, Site Type, and Operator. The sub-totals for each group can be useful for some daily accounting tasks -- sort by Payment Method to get the total receipts for cash, Visa, Discover, etc., or sort by Type to get the total Payments (receipts), Tax charged, refunds, etc.

Some of the totals and subtotals need to be explained further. In addition to the total number of transactions at the bottom of the list (and subtotals after each group), you will see values under the Qty, Each, and Total columns.

The Qty total is self-explanatory, although not terribly meaningful unless the list is sorted by Category since otherwise the quantities for days rent, supplies, propane and so forth would be mixed together. (Depending on how your categories are defined, some Qty totals may not be useful in any case.)

The totals under the Total column would seem obvious, but keep in mind that some transaction amounts are added to the total while others are subtracted, even though the individual transactions almost always show a positive amount. For instance, any "Charge" transactions, including Taxes, are considered negative values, and receipts like Payments and Deposits are positive. Expenses are negative, Misc. Income is positive, Refunds are negative, and so forth according to whether the amount would be a credit or debit to the campground. (Also note that when viewing Reservation balances and printing reservation receipts, these values are reversed since they are from the customer's perspective -- charges are positive outstanding balances, while payments subtract from their balance.)

It's important to note that if you accept advance Deposits, the totals on the detail report probably won't mean much. For one, Deposits are added just like Payments, not reflecting true income. In addition, Deposits Applied also affect the total here, even though they don't affect the actual balance due for reservations, etc. So if you're not filtering out these transaction types, the overall total won't be meaningful.

As if this wasn't confusing enough, you have the option to show all totals as positive for summary reports -- more on that later, since it doesn't affect the Detail view.

Finally, there are the totals in the Each column. These are calculated as an average -- the Total divided by the Qty. Obviously these values only make sense in the cases where Qty makes sense, and when the transactions are sorted/grouped by something like Category or Type which will separate the charges from the receipts.

Editing Transaction Details

If you have the proper access level you can edit transaction details or delete transactions. It can't be done directly from this report, but you can right-click on any transaction and select Transactions from the menu to open the Transactions dialog. From there you can view the transaction details and make changes as needed. Refer to the *Working with Transactions* for more information.

Filtering Transaction Reports

There are many filtering possibilities with the transaction reports. The most common ones, Transaction Type and Category, are available as drop-down lists in the controls area. The others are available on the Filters dialog, accessed through the More Filters... button. As with the Site Types filtering in other reports, when selecting a filter you are choosing to see only those records (transactions) of that type or category. Note that if you see "-----" in one of the drop-down lists, it means that a more complex filter has been defined from the filters dialog, which can't be shown in the drop-down list.

For Categories, you can select a single category or "All Categories" from the drop-down list, or select any number of categories from the Filters dialog. Keep in mind that Charge type transactions are about the only ones that will have your defined categories, since other types like Payments have their own "payment" category. Thus if you select the "Propane" category, you will see the charges for propane, but not the taxes or payments that are probably associated with it. (This is generally what you would want to see in any case.)

For Transaction Types, you can choose a single transaction type, All Transaction Types, or one of two special groupings from the drop-down list -- All Receipts or All Charges. More specific filtering can be done through the Filters dialog.

From the Filters dialog, you can have additional filtering for Payment Methods, Discounts Used, and Operators. Each of these is presented as a multiple-selection list box. This means that you can select a single item in the list (click on it), or you can select any number of items at once (hold the **Ctrl** key down when you click on each item). Note that you can also de-select an item with Ctrl-click also. To disable filtering for a particular field, you can either select all of the items the list or de-select all items. You can also use Reservation Filtering to select the sites or reservation types you want to include, which uses the Reservation Filtering dialog.

The flexibility of filtering any or all of these fields can be useful for customized reports, but you will need to be familiar with the way transactions are defined to avoid mistakes. For instance, if you try to filter by the Cash payment method and the Good Sam discount, your report will be empty because payment methods only appear in Payment transactions and discounts only appear in Charge & Discount transactions -- so no transactions would meet both filter criteria.

The Reset All button is a handy way to clear all of the lists, resetting to "no" filtering.

You can also set the dates in the Filter dialog. While the dates here are the same as the ones in the view controls, there are four helper buttons that can be handy -- Month-to-Date, Last Month, Year-to-Date and Last Year. These simply calculate the appropriate start and end date for the From and To date fields -- you will see the dates change as you click on the buttons.

Summary Transaction Reports

All of the summary financial reports available in Campground Master are generated from the Transactions view. You can go to the Summary Report Options dialog by checking Summarize and then using the Options... button (or just click the separate "Summary Options..." button if your screen resolution allows it), for full report control and some pre-defined Quick Reports.

Summary reports are basically a condensation of the detail reports to just the group subtotals in one dimension, with the ability to show multiple days, months, or years in the other dimension. So summary reports are shown as a grid with dates across the top and group summaries (Types, Categories, Pay Methods, etc.) in each row.

You can also flip this orientation (like flipping the Rack view), so dates are in rows and groups in columns. This can be done either through the Options dialog or from the right-click menu. Another option that can result in nicer looking reports is the Grid Lines option in the right-click menu. Turning off grid lines and printing in color to show the shaded "total" rows and columns (*Print Black & White* option turned off) will result in a very professional-looking report.

You have all of the same filtering options for Summary reports as you do for Detail reports, through the Filters dialog, so you can refer to those sections for filtering information.

Simple Summaries

You can generate a quick and simple summary using just the control area in the Transaction view. Select a date range and a Type and/or Category filter as needed, click on a header to sort by one of the grouping fields (Type, Category, Pay Method, etc.), and click the Summarize check box. The resulting summary report will group by the field that you sorted and the dates in the range you selected, showing one row for each day and one column for each Type/Category/etc. Note: if there are more than 10 days in the date range, the orientation will default to dates in columns. If you prefer a different orientation, right-click anywhere on the grid and select "Flip Orientation". You can then print the report with the Print icon on the toolbar.

More Summary Options

For more control over the summary report, click the Summary Options... button if present, or click the Options... button making sure the Summarize check box is checked first. The top area of the Options dialog allows you to select the grouping method (Select one of the options, or None to show only one grand total instead of group totals) and the Summarize period (Daily, Monthly, Quarterly, Yearly or none). Note that selecting None for both grouping and summarize period will result in a single total value -- not terribly useful for a report!

Keep in mind that the date range selected in the filter (or tab view controls) takes precedence over the Summarize period. So for example if you summarize Monthly and selected the date range of 4/1/2001 to 5/1/2001, it will show April and May month summaries in the report but will actually be reporting for only one day in May due to the 5/1/2001 ending date. This could result in a misleading report.

There are some other options you can select for the report, plus a button that opens the Transaction Filter dialog (this is same as selecting More Filters... from the control area in the tab view).

Hide items with zero totals -- This option is useful for reports such as category reports. When selected, only the categories (or other groups) will be shown that have non-zero totals, so the report is smaller. Of course if you're grouping by Operator, for instance to see if the charges and payments balance out, then you would **not** want to hide the zero balances -- the zeros are what you want to see.

Show charges & expenses as positive values (invert) -- This option is useful for reports that would normally show negative values, such as a Tax category report. (Since taxes are charges to the customer, they are considered a negative amount). This will create a cleaner-looking report.

Show Deposits Applied as payments -- This option will obviously only be useful if your report includes Deposit Applied transactions. Examples of this are the Balance Charges & Payments report and the Accounts Receivable report. Normally the Deposit Applied transaction is considered a negative deposit (payment), so that it negates deposit transactions in terms of the overall Deposits Balance. In these reports, however, it's necessary to consider deposits applied as positive payments so that the balances are correct.

Include cumulative totals for each period -- When this option is selected, two extra rows (or columns) will be added to the report, showing Previous and Cumulative Totals for each date period. This could be used to seeing a running balance, or it may be useful when exporting values to graphing software like Excel. Note that the first period's "Previous" total will be zero unless you also use the option to include all prior dates (below).

Include group totals for all prior dates -- This option is used when you need an all-time total, for instance when calculating the Deposits or A/R balance. It adds 2 extra columns (or rows) to the report, showing Prior totals and All-time totals for each group (e.g. each transaction category). Obviously it can only include prior transactions that are actually in the database, so "All-time" means since you started using the software, or since you last purged old data.

Quick-Reports

From the Options dialog you can select one of the Quick-reports. These are predefined sets of filtering and grouping for some common reports. You should first select a Summarize period and a date range (from the Filter dialog or in the control area of the tab view), since the Quick-report selections don't affect these, and then click the appropriate Quick-Report button.

Once a Quick-report is generated, you are free to change the filter or options if you like. The Quick-report buttons don't actually change to a particular report mode, they are just a convenience that sets the filters and groupings for you when you click the button, to generate a particular type of report.

Memorized Reports

Setting up the reports the way you like them can be a chore, and can result in accounting inconsistencies if you don't use the same settings each time. To avoid this, you can save the settings once you have them the way you like, and call up the same settings every time. There is no limit to the number of different reports you can memorize.

To memorize a report, open the Options (or Summary Options) dialog once you have the settings (filter, groupings, summarize period, orientation and other options) the way you like. (Note that every setting in the Filters and Options dialogs will be saved to a memorized report **except** the dates -- obviously you would want to use different dates each time you run the report.) Click the Save Report button, and you will be asked for a name for the report. You can make this name as long and detailed as you like, but try to keep it small enough to fit in the Memorized Reports list on the dialog. Click Save and the report settings will be memorized under that name. You can also delete reports as needed by selecting the report name and clicking the Delete button.

To recall a memorized report, simply open the Options dialog, click on the name of the Memorized report you want, and click Load Report. (Alternatively you can just double-click on the report name.) The settings will automatically change to the saved settings (except the dates, as mentioned above). Then click OK to generate the report, or you can click on Filter... to select a date range (You can also select the date range from the controls area on the tab view, but the Filter dialog has the handy buttons for Month-to-Date, etc. that you might prefer to use.)

6 Working with Reservations

Overview

Keeping track of reservations are naturally the main purpose Campground Master. Most functions of the program revolve around the various tasks involved in recording reservation information, locating that information when needed, making changes, and keeping historical data for reporting purposes.

One important thing to remember that "Reservations" are **not** the same as "Customers" in Campground Master. "Reservations" are records that contain the information about a single stay for a particular customer. Most of the actual customer information is stored separately in a "Customer" record, and the reservation only references that customer by an internal number. There are many reasons for this, but the main reasons are efficiency and continuity -- the customer information only needs to be stored once, no matter how many reservations that customer makes over time. Likewise, if you change the customer information, it's automatically changed for all of that customer's reservations.

Starting a New Reservation

The way to start a reservation (or at least the quickest way) will vary depending on the circumstances. For instance, if you're entering a reservation for a walk-in customer and you have the Rack view showing, the quickest method would be to double-click on the cell for today, on the desired open site. That instantly sets the site and the start date for the reservation, saving two steps. If you are taking a reservation on the phone for some time in the future, the quickest way is probably to click on Phone icon on the toolbar (New Reservation).

If you prefer getting all of the customer's information first, it may be easier to use the Add New Customer function (faces icon), enter the customer information, and then click New Reservation on the Customer Details dialog. Or if you're making a returning reservation for a customer that's leaving today, you can flip to the Departures tab, right-click on the customer's name and select New Reservation for this customer so the customer information is already filled in.

Here's a complete list of ways you can start a new reservation:

- From the file menu, select Reservations | Add New Reservation. (**Alt-R, A** from the keyboard.)
- From a Customer Details dialog, click the New Reservation button.
- Click on the New Reservation (phone) icon on the toolbar.
- Double-click on an empty cell in the Rack (the site and start date are automatically filled in).
- Right-click on a customer in any of the tab views, select New Reservation for this customer (the customer information is automatically filled in).

Two other functions can result in new reservations being created, but are used in special cases:

- Right-click one a reservation in the Rack, and select Add Concurrent (Linked) Reservations.
- Right-click one a reservation in the Rack, and select Split Reservation at this date.

The New Reservation Dialog

A New Reservation dialog will be opened whenever you need to enter reservation details. (It's also used for assigning sites to existing reservations.) This dialog has entry fields for the basic reservation information, plus a miniature version of the Rack view. This miniature rack view can be used to select a site, and can be filtered by site type, site preferences, and available sites for the desired dates. As with the main Rack, it will show a red divider line to indicate the start of today, and it may also start with yesterday in the first column (depending on the Options settings).

Note: If a Default site type filter is defined for the Rack view, this filter will also be used as the default for this mini-rack view.

First and Last Night

The first thing to do is verify the first and last night of the stay. The first night may already be set, depending on how you started the reservation. In this case, the mouse cursor will automatically be placed in the Nights field, with the number 1 highlighted. (To change the number of nights, all you need to do is type the new number, and the 1 will be replaced with the new number.) Otherwise, you will want to select the date for the First Night, and then either select the date for the Last Night or enter the number of nights -- when one of these two fields is changed, the other one automatically adjusts to match.

Days of the Week

If you have reservations that occur on certain days of the week, for instance if customers commonly reserve a site for every weekend for several months in a row, then you may want to enable the "weekdays" fields for reservations (see Define Data Fields under the Maintenance menu). If these are enabled, then you will be able to select the specific days of the week to reserve, instead of making a separate reservation for every weekend.

If these are enabled, you will see a series of check boxes, with S, M, T, etc. above them. Just select which days to apply. Note that it may default to having none selected, which is the same as if all are selected so you don't need to select them all each time.

Note that if these fields are enabled, it will slow down some processes like updating the Rack view, so only use them if this is a common occurrence.

Finding A Suitable Site

If you don't want to assign a site at this time, or if you started by double-clicking on the rack so that a site is already selected, then you can skip to the Customer Information now.

If you know beforehand what site you will use, you can also use the Quick-Pick list to select a site -- just click on Quick-Pick, scroll the list if necessary, and select a site. It will automatically be used and shown in the mini-rack, and you can continue to the Customer Information.

Note: the Quick-Pick list will only show sites according to the site type filtering, as is the mini-rack. If you don't find the site you want, try resetting the site type selection to "All Site Types".

Another way to jump a particular site quickly is by using the Search function -- **Alt-S** or **F9**. Just enter the site number or partial name in the dialog that opens up, and the mini-rack will scroll down to that site immediately.

Showing Available Sites

If you need to find a suitable site for this reservation, you first need to verify that you have a vacancy for the nights selected. You can do this quickly by checking the box [Show Available](#). Any sites with existing reservations for the selected nights will be eliminated from the mini-Rack view. (The specific sites filtered out follow the same rules as for the [Available Only](#) option on the Rack view -- see *Program Options and Settings* for details). If you find that you almost always check the Show Available box, you can save time by making this the default for new reservations. This setting is in the main menu under Maintenance | Program Options | Functions.

If you're familiar enough with your campground's sites to know which ones are suitable for the customer, you can immediately select one of the sites to use (see below) and move on. Otherwise, you may want to further filter the list by selecting a Site Type or Site Class from the drop-down list (both types and classes can be selected from the same list), or by clicking on [Site Preferences](#) to enter a detailed list of the customer's needs. Preferences include things like as sewer, cable, rig length, waterfront, or any other attributes you have defined (see the *Maintenance* section for details on defining preferences).

Site Preferences

If you want to select a site by specific attributes, you can use the Site Preferences. The [Use](#) box in front of the [Site Preferences](#) button is checked by default, but in most cases the preferences are empty so this has no effect until you select preferences. The exception is when changing sites for an existing reservation -- any previous preferences selected will be used automatically. Any time you want to ignore the preferences, simply uncheck the [Use](#) box.

The Site Preferences dialog shows a list of attributes that a site can have. For each attribute, there are three possible selection methods -- a drop-down list, a value, or a Must Have/Must Not Have selection. Note first that any attribute which is blank (showing nothing next to the name) means that the customer doesn't care about that attribute, so it is not checked against the sites. The list should start with all blanks, unless you have already chosen a Site Type from the reservation dialog (that's actually one of the attributes).

If you select a value from one of the drop-down lists, for instance the Site Type, Site Class, Pad Type, or Site Facing, then you will be limiting the available sites to those that match that attribute exactly (this is one reason to define the pick lists for these attributes carefully).

If you enter a value for an attribute (for instance the Rig Length, Site Length, or Site Width), then any site with that value or greater will be shown.

The other types of attributes, such as 50A, Phone, and Handicapped Access, can be either "Must Have" or "Must Not Have" (or blank). Note that when the attribute is blank there is a check box that's gray, meaning no selection. If you click it once, it will change to Must Have, and the box will be checked. If you click it again, it will change to Must Not Have, and the box will be white but unchecked. Finally, if you click on it a 3rd time, it will go back to the blank (gray) state.

After making your preference selections you can [Save](#) them, or if you change your mind you can click [Cancel](#) and none of the changes will be saved. Once they are saved, the mini-rack on the reservation dialog will remove any sites that don't fit the preferences criteria (preferences will filter the rack whether [Show Available](#) is checked or not, since [Show Available](#) only filters out sites with existing reservations).

Note that these preferences will stay with the reservation. They will show up on the reservation's Quick-Info window, and will appear in the Requests column of some of the tab views. Site preferences are especially useful when making unassigned reservations (a reservation with no site assignment), as a way to remember what attributes the customer asked for.

Selecting Sites

By now you should be able to see what sites are available for the selected dates on the mini-rack view. To select a site, just click on an empty cell in the rack for that site, and then click the [Add Selection\(s\)](#) button. Alternatively, you can simply double-click on an empty cell for that site, just like on the main Rack view, or right-click on the site and select [Assign Site](#). That site's cells for each of the reservation dates should immediately fill in, with the word **<new>** in red-on-yellow.

If any of the dates conflict with other reservations, they will be shown with asterisks (***) in yellow-on-red. You won't be able to complete the reservation with conflicts, so you need to adjust the dates or pick a new site before continuing.

If you're booking a group under a single name, or if you need to reserve an additional site for the same person (for example a trailer storage spot), you can reserve multiple sites at once. You can add additional sites to a reservation by selecting another site in the rack and clicking [Add Selections\(s\)](#) again, etc. Each site selected will show in the [Site\(s\) Selected](#) field, in addition to being shown as **<new>** on the rack. If you have a lot of sites to select, you can do it easily using **Ctrl**-click on each one (select multiple individual sites), or click on the first one and **Shift**-click on the last one to select a whole range of sites. If you need to start over, use the [Clear Sites](#) button to clear all selected sites.

Clarification -- although this is referred to as "adding additional sites to a reservation", remember that technically each reservation record can only have one site assigned to it. When you select more than one site, it will actually create multiple reservation records. Each of these reservations will be identical except for the site assignment, and they will be *linked* together and *synchronized* (also called *concurrent* reservations). This linked status will be tracked whenever you make other reservation changes or operations like checking in and out, so they can stay synchronized and act like a single reservation. For more information, refer to the [Groups and Linked Reservations](#) section.

Here's a quick tip -- If you have not yet indicated a start date (for instance if you started from the Phone icon), you can select the date and site at the same time, similar to double-clicking on the Rack View. Just go straight to the mini-rack and select a site on the desired start date. In fact, you can select the entire date range right on the mini-rack -- drag the mouse to highlight all of the cells needed (e.g. 3 cells for 3 nights, starting on the appropriate night) and click [Add Selection\(s\)](#). The date range will change to the range of cells selected on the rack. Be careful with this, though, since any subsequent multi-date cell selection will change the dates again to the newly selected cell dates. Only single-cell selections will leave the dates alone once they are set.

Checking Rates

Once you have a site and dates selected, you can use the [Check Rates](#) button to show the rate(s) available and calculate how much it would be. This is useful if they want to know the rate before making the reservation or giving you more information.

Don't Move

An extra preference you can set for the reservation, which is a reservation status rather than a site attribute, is the [Don't Move](#) option. If you want to make sure that this reservation is not moved to another site (e.g. to make room for someone else), check this box. This will be flagged as such and the Assign Site functions will be disabled for this reservation (unless of course the [Don't Move](#) option is manually unchecked again).

Group

This flag can be set for any kind of group reservations you like. In addition to the color coding of the reservation on the Rack, it affects how the reservation is handled if it's linked to other reservations. For instance, Group reservations get a Group Leader assigned to them (automatically set to the first customer used for the reservations, and certain options are available for groups that aren't available for other reservations. See the *Groups and Linked Reservations* section for more details.

Extended Stay

Set this flag if the reservation is a long-term reservation that will pay monthly instead of all at once. This flag must be set for any reservations you want to include in the Monthly Billing function (see *Working with Transactions*). This can also aid in filtering these kinds of reservations for reports, and makes the reservation appear in a distinct color on the Rack and other reports.

Depending on the settings in Maintenance | Program Options | Monthlies, checking this box before changing the last night manually will automatically set the Last Night to an appropriate date for monthly reservations, and optionally set the Blocked date to an appropriate date. For instance, it can reserve the site to the end of the year, or the end of next month, or make it a certain number of months long.

Free Site

Set this flag if the person is staying for free, such as a work camper or other special situation. The reservation is colored differently on the rack, and is excluded from Payment Due reports unless there's a balance for some other reason).

Customer Information

Once the site selection is taken care of, you're ready to either select a returning customer or enter the new customer information. No reservation can be made without at least a customer last name. (The minimum reservation has a first night, last night, and customer last name.)

Note: If there's already customer information when the dialog is opened (e.g. you're using this dialog to assign or change the site for a reservation, or add a new reservation for an existing customer), then all of the customer information fields will be disabled to prevent accidental changes to the customer.

Note that some of the information in the Customer area will come from (or become part of) the Customer record as well as stored with the Reservation record. This includes the Notes and the number of Adults, Children, Pets, Extra Vehicles and Extra Trailers. This apparent duplication is actually necessary so that it can be changed for each reservation they make (for instance, the number of children tends to change over time). When an existing customer is used, the information is automatically filled in from the customer's record. Any changes you make to the information (including the name, address, and phone) will be saved back to the customer's record, whether it's an existing customer or a new one.

Also note the [Customer Details](#) button. You can use this at any time, to enter or edit other customer information such as their vehicle information, driver's license, discount clubs, etc. You can also view their previous reservation history (for instance to see what sites they used before, or to verify an outstanding credit balance from a prior stay) and their transaction history. The amount of customer information you keep track of is up to you, but we believe that the more information you have the better prepared you will be to handle emergencies.

Returning Customers

If reserving for a returning customer that you have in the customer database, you don't have to enter the information again. You will use the [Find Customer](#) function to select an existing customer from the database.

There are two ways to do this...

The quickest way is to enter a portion of their last name in the [Last Name](#) field, then press **Tab** or **Enter**. (One letter is enough, but the more letters you enter the more direct match you will get). A small Select Customer dialog will appear (unless it's disabled in Maintenance | Program Options | Functions), listing any customers that match the last name entered so far. Simply select the customer from the list. (See the next section for details on using that dialog.)

If the above option is disabled, then you can still click the [Find Customer](#) button (or press **Alt-F**) after entering a portion of the last name. Any customers with last names starting with those letters will be displayed.

In either case, after selecting a customer and clicking "Use", the customer's information will be copied to the New Reservation dialog, including any Notes, and the [How-found](#) field will be changed to "Return visit" automatically. If you selected the wrong customer by mistake, you can go back to Find Customer and select a new one (any changes made to the customer fields here in the meantime will **not** be saved).

The other method is to go straight to [Find Customer](#) without entering a portion of the name, and then search the list using the available options. There are various ways to search for customers (address, phone, first name, etc.), so this can be used even if you don't know their last name. For more information, see the section *Working with Customers*.

It's important to know that the customer notes will be copied to the reservation's Notes field (and shown here for reference), but future changes to the customer's Notes or the reservation's Notes will not automatically be copied back and forth. This is so that you can keep specific notes for the customer that don't necessarily apply to the past reservations (e.g. "don't put next to the dump next time"), and likewise you can make notes to the reservation that don't stay with the customer (e.g. "cancelled due to flood").

New Customers

If this is a new customer, simply enter the information you know. Starting with the Last Name, you can use Tab to jump to each field in a logical order. Note that the Address 1 and Address 2 are typically used for addresses that require additional lines, rather than 2 separate addresses. This would be important if you plan to print mailing labels, for instance. If you want to store a second address for the customer, you can use the Notes field.

Once you've entered some customer information, you can use the [Customer Details...](#) button to enter further details as explained above. It's a good idea to have their rig and vehicle information if you can get it, just in case you need it for authorities (e.g. to find them in an emergency, or if they are reported missing). You can also record their discount club information here for future reference.

Since you did not use [Find Customer](#), a new record will be created for this customer when you complete the reservation. However if you abort the reservation (with the [Cancel](#) button), the customer information you entered will **not** be saved. If you want to enter customer information without a reservation (such as entering your old customer records), you should use the [Customers](#) | [Add a New Customer](#) from the main menu, or [Customer Details](#) from the menu, or the Customers toolbar icon.

Notes

If you're changing the site for an existing reservation (or adding concurrent sites), any previous reservation notes will appear here. If you selected an existing customer, that customer's notes will appear here, and will be copied to the reservation (if not changed). In any case, you can edit or add notes as needed. Notes will be shown as a single line here, but you can enter multiple line notes as long as you like by clicking the "..." button at the end of the notes entry field. This will open a separate Notes dialog for entering the notes. Any current notes will of course be shown, and the cursor placed at the end so you can begin entering notes immediately. When multi-line notes are displayed as a single line, for instance on the Detail dialogs or in lists, each line break will be shown as a double-backslash (" \\ ").

Finishing Up

At this point, you have several choices. In most cases, if you're making a simple future reservation, you can click Done if you have a site selected successfully or if you want it booked without an assigned site. If it's a walk-in that you're ready to check in right now, use the Check In! button at the bottom of the dialog, which will take you straight to selecting the rate and/or entering transactions (assuming the options are set up to do so). Note that if no site has been selected, the button will be "Day Pass" instead of "Check In", since you can't check in reservations without a site assigned. See the section on Day Passes for more information on this.

If you're not checking in at this time but want to go ahead and add charges or enter a deposit, then use the Enter Charges button. This will save the reservation and go straight to the Transactions dialog, opening the rates selection so you can add charges immediately.

If this is just an inquiry by a potential customer but you want to record the information for reporting purposes (or in case the customer calls back to make the reservation), click the Inquiry button. The information will be saved but it will not reserve the site. If they do call back to make the reservation, you can find them on the Non-Reserved tab view (or through the Find Reservations function), go to the Reservation Details dialog, and change the status from Inquiry to Pending (or Confirmed or Guaranteed).

If the customer did want to stay but you could not find a suitable vacant site, then you should use either the Waiting List button or Cannot Book button, depending on whether the customer wants to be notified if something becomes available. It's recommended that you use one of these rather than just canceling the reservation without saving it, so that you have some useful statistics later on. Also, if they call back later and you do have an opening at that time, then you already have their information and can re-activate the reservation easily (see the Non-Reserved tab view).

The other option, which will be used most often, is to click the Continue to Details button, which will close this dialog (saving the reservation the same as if Done was used) and open the Reservation Details dialog automatically. From there you can perform further actions -- Confirm or Guarantee the reservation, add charges or a deposit transaction, add guests to the reservation, etc.

The Select Customer Dialog

This dialog appears when entering new reservations, after entering something in the Last Name field and pressing **Tab** or **Enter**. (One letter is enough, but the more letters you enter the more direct match you will get). This dialog will show any customers that match the last name entered so far, and the first one will be highlighted. Pressing Enter will immediately use this customer, or you can use the arrow keys or the mouse to select a different customer to use.

If no customers matched the initial search, a message will be shown instead of a list. From there you can press **Enter** (or click [Add New](#)) to open the Add New Customer dialog and enter the information, or just Cancel to go back to the New Reservation dialog and enter the information there.

Other options on the Select Customer dialog allow you to view (and edit) Customer Details for the currently selected customer, do a more advanced Find Customer ([Find More](#)), or add a new customer.

This dialog may be disabled if you prefer -- see Maintenance | Program Options | Functions.

Day Passes

If your park issues something like day passes, assumed to be a pass allowing them to come and go and be in the park any time of the day that it's issued, then the Day Pass function can be used for this.

Day passes are essentially a special kind of reservation without a site assigned, and are created the same way as reservations, using the New Reservation Dialog. Day passes do have a first and last night, a customer, transactions, etc., but do not need to be checked in or out. Once a day pass is created, its status cannot be changed to cancelled -- the only way to remove it is to delete it.

To create a day pass, start with the New Reservation function, but not from a specific site -- use the Telephone icon, or start by adding a customer and then use the New Reservation function. Since the New Reservation dialog will default to "today", all you need to do once a customer info is entered is click the [Day Pass](#) button at the bottom. This is in the same place as the [Check In](#) button -- as long as no site has been selected yet it will be Day Pass, but if a site is selected it changes to Check In. Note that you can make day passes for multiple days, or you can start them at a later date if you like -- just change the dates as with other reservations.

At that point, you will be taken directly to Transactions / Select Rate(s), with the Day Fee rate type selected. (You should have one or more appropriate day pass rates defined as "day fee" rates.) Just add the appropriate rate from the list (double-clicking on it is quickest) and click Done. The Transaction dialog will then be shown so you can enter the payment and print a receipt.

There isn't a special receipt type for day passes, but any receipt printed will show "Day Pass" in place of the site number. The Ticket Form receipt format is probably most appropriate for this, since "Day Pass" will be in a large font and could be used in a car window.

Day passes are handled in reports just like any other reservation that has no site assigned. The main difference is that normal reservations cannot be checked in without a site assigned, while day passes are assumed to be "checked in" as long as their date is current. Thus you will be able to see day passes on the On Site report, as well as the Arrivals, Departures, and Unassigned views. They will show "(Day Pass)" in place of the site name, to distinguish them from other unassigned reservations. They will typically be listed below any reservations with sites assigned to them, depending on the sorting used of course. A quick way to see the day passes is to select "Unassigned Sites" from the Site Type drop-down list on these reports (or go to the Unassigned report). Of course the day passes won't show up on the rack since they have no site assigned.

Temporary Guests

Because day passes are for specific dates, you may want to use these for temporary "guests" instead of the other Reservation Guests -- especially if you charge guests for visiting. While you won't be able to link them to the reservation or site they're visiting, you can add that information to their notes.

Groups and Linked Reservations

Group reservations and other linked reservations can be created easily, which can save time maintaining reservations for multiple sites.

Clarification -- although they are often referred to as "group reservations", remember that technically each reservation record can only have one site assigned to it. When more than one site is linked, or in a group, it's actually multiple reservation records with internal links between them. This allows them to be handled in certain ways as a single reservation.

Terminology

There are several terms used when referring to linked reservations:

Linked -- this is the most general term, and refers to any reservations that are linked together. Linked reservations start out as Synchronized when making concurrent reservations, but even if they become un-synchronized later they will still be linked. Any linked reservations will be listed on the Reservation Details dialog and on the reservation's quick-info pop-up window.

Synchronized -- This means that the reservations are not only Linked but also maintain the same dates and status. When making concurrent reservations, they always start out synchronized. When changes are made to a synchronized reservation, you will be prompted to keep them synchronized or not. If so, then the same changes are made to any other reservations that are currently synchronized with this one. If not, then this reservation becomes separated as far as synchronization, but is still linked to the original ones or reference. For instance, one reservation in a group may leave early so it must be un-synchronized (you don't want the others to leave early), but it's still linked so you can see that it was part of the group.

Concurrent -- This term is interchangeable with synchronized -- identical reservation dates and status make them "concurrent" reservations.

Master / Linked Master -- Whenever two or more reservations are synchronized, one will be designated as the Master. This master is the reservation that should maintain the transactions for the multiple sites as long as they're still synchronized. The master will be indicated on the Reservation Details ("Master of" will be shown in front of the linked reservations, and when viewing a list of linked reservations it will be tagged "[Linked Master]"). While you can make transactions with the non-master reservations, it's not recommended and a warning will be shown.

Group -- Groups are mostly just linked reservations, but selecting the Group option on the reservations allows a few extra things to happen. See below for details.

Group Leader -- Any reservation flagged as a Group reservation will have a Group Leader field. This is basically a link to a customer record, and the customer used when making the first reservation of the group automatically becomes the group leader, whose name is essentially the name of the group. This cannot be changed, even if the customer of every reservation is changed.

Working with Linked Reservations

Linked reservations can be created in two ways:

1. Select multiple sites when making a New Reservation. This will immediately create a reservation for each site selected, and they will be synchronized. The reservation for the first site selected will be considered the master (so it's best to add the "lowest" site to the list first).
2. Use the Add Concurrent Reservations function on an existing reservation. This will create additional reservations, synchronized with the original one, for the same customer and with the same dates & status. The original one becomes the Master, unless it's already synchronized with other reservations (which will already have a master).

Generally the idea is simulate a single reservation for multiple sites. As long as they're Synchronized, any changes made to one of them can be applied to all of them at once (see Synchronizing Linked Reservations). For instance, lets say one person reserves an RV spot, a storage space, a boat dock and phone line for the same time period. If he then changes his arrival date, you only have to make the change once for all of the reservations. Likewise, when checking in and checking out, it's done once instead of separately for each of the 4 reservations.

When entering charges for the reservations, they can all be added to one reservation (typically the "Master" as described above). The Select Rates dialog will know about the concurrent reservations and will let you add the rates for all of them at once, and print a single receipt with all of the charges.

Linked reservations will be shown whenever you view the quick-info pop-up window or Reservation Details for one of the reservations. This will also show which one is the Master, and whether they are still synchronized. If not synchronized, it will show the customer for the reservation. (The customer can be changed for linked reservations, but they can no longer be synchronized if so.)

At some point you may need to make changes to one reservation but not the others. After making any changes that affect synchronization (e.g. dates or status), you will be asked if you want to keep them synchronized. Answer No so that the changes aren't copied to all of the other synchronized reservations. This reservation will no longer be synchronized, but any remaining ones will still be synchronized with each other (unless there is only one remaining). This means that you can still see the linked reservations, but any further changes won't be copied to the others (and you won't be asked, since they're already un-synchronized).

Once a reservation is linked to others, there are only two ways to "unlink" it -- Cancel it or Delete it. (If you Cancel a synchronized reservation, you will be given the option to keep them synchronized, which would cancel all of them.) If the Master for synchronized reservations is deleted or cancelled, the next one "in line" will become the new Master for any remaining synchronized reservations.

Note that linked reservations must have sites assigned -- it will not allow changing a linked site to "unassigned", or adding a concurrent reservation that's unassigned.

Group Special Handling

Groups are generally just linked reservations with the Group flag set. Working with them is the same as other linked reservations, with a few exceptions.

One difference you'll notice besides the color difference on the Rack is that group reservations will show "[Group]" in the pop-up tips for with the reservation customer, and will have a Group Leader. If this reservation's customer is not the same as the group leader, the group leader's name will appear in the pop-up tip as a group name, like "[Group : Good Sams]". Also note that the Master of a group (not the leader, but the Linked Master) will be shown in a darker color (according to the Color Key). This aids in separating groups visually if you have more than one group and they are next to each other, and also indicates which reservation should receive transactions as long as they are still synchronized.

When making group reservations, it works best if you make the initial reservation under a group name (add a customer whose Last Name is the group name you want to see, for instance). The first customer used for a group will automatically become the group leader for the group. You can change the customers for the individual reservations later (see below).

The group leader will also be shown in the [Reservation Details](#) dialog, along with a View button. You can use the View button to see the Customer Details for the group leader (and make changes if needed), but you cannot change which customer is the group leader.

The group leader information is really just a reference, and has no special function other than showing up in various places.

One real advantage to a group reservation is that a "Change Customer" option will be available on the right-click menu if it hasn't been checked in yet. While Change Customer is always available on the Reservation Details dialog, it's handy to have on the right-click so you can change it just before checking them in (it appears right on top of the Check In option as a reminder) -- when an individual for a group arrives, first change the customer name (adding a new one if needed), and then check them in. Note that changing the customer will automatically un-synchronize the reservation, so that the check-in status (and dates if necessary) can be changed for just that reservation. Un-synchronizing also means that when the rates are selected, only the rates for that site will be shown.

Checking In

You can check in a reservation from the right-click menu on the tab views, or from the Reservation Details dialog by clicking on the [Checked In](#) check box. If it's a walk-in reservation, you can also select [Check In](#) directly from the New Reservation dialog.

A checked-in reservation is treated differently in many ways, most of which were already covered in the *Dynamic Interactive Reports* section.

One thing to note about color coding for a checked-in reservation is that once it's checked in, other status flags can affect its color so that a checked-in reservation can appear in several different colors. The most important one is whether it's paid or not -- the text will be red on the Rack for any dates that have not been paid for. (Like other colors, this can be changed through the Color Key). Also, a different background color will be used for Extended Stay, Group, and Free (complimentary) reservations once they are checked in.

Normally you will be checking in a reservation with today as the First Night date. If the reservation's First Night is not today, a warning message will give you the choice of aborting the check-in, checking it in and changing it to start today, or checking it in with the original start date. Be careful how you answer this, or you could change the start date by accident and then have to change it back to what it was (if you remember what it was!) These warnings typically happen when initially entering reservations for people that are already here when you start using the software, and later if you forget to check someone in and do it on a later date.

However if someone arrives earlier or later than their planned reservation, you will get this warning if you don't change their start date before checking them in. (Actually it's a nice feature to have the software offer to change the date automatically, which saves a step -- just be sure to read the warnings carefully.)

If you do change the start date of the reservation (as a result of the prompt mentioned above), you will also be asked if they will be staying the same number of nights. If you answer No, the reservation's original Last Night will remain the same. If you answer Yes, then the Last Night will be adjusted automatically to make the number of days the same. If you find this prompt more of a burden than a help (i.e. if you nearly always answer No), then you can turn it off in Maintenance | Program Options | Prompts.

Now, once you've confirmed that you want to check in the reservation, the Transactions dialog will appear so you can enter charges, payment, etc. and print a receipt. Note that if you click Cancel on the Transactions dialog, it does not cancel the check-in, only the transactions. In addition, you can have it jump immediately to Select Rate(s), where you can immediately select the appropriate rate from a list.

These are both options that can be disabled -- if you prefer not to see the Transactions dialog automatically every time you do a check in, or don't want to select the rate immediately, you can turn these functions off in Maintenance | Program Options | Prompts.

If you checked in a reservation by mistake and want to undo the check-in, go to the Reservation Details dialog and click the Checked In check box, then confirm the undo. Manager access is required for this function.

Checking Out

You can check out a reservation from the right-click menu on the tab views, or from the Reservation Details dialog by clicking on the Checked Out check box. A checked-out reservation is treated differently in several ways, most of which were already covered in the *Dynamic Interactive Reports* section. On the tab views, a checked-out reservation is always the same color, typically a dark gray.

Normally you will check out a reservation on its Last Night date or the day after. If either one of these is the case, you will notice that the right-click menu on the tab views will show "Check Out (Today)" or "Check Out (Yesterday)" as appropriate. That's a clue that today or yesterday will automatically be assumed when you perform the check out. If this is not correct, you will need to adjust the Last Night to be correct first, and then check them out. Note that this assumption is also true if checking out from the Reservation Details dialog, but there is no Today/Yesterday indication -- it's up to you to verify that the Last Night is correct.

If the Last Night is not yesterday or today, you will get a warning that they are not scheduled to leave yet, or that they were scheduled to leave earlier. If their Last Night is in the future, your only options are to cancel the check-out (presumably because it was a mistake) or make yesterday their last night. In other words, you can't actually say that they left in the future. However if their Last Night is in the past, you are given the choices similar to Check In -- abort, check out with yesterday's date, or check out without changing the Last Night. Therefore if you forget to check out some old reservations, you can do it later and not affect their departure date. Of course if they really are just leaving, you can have it automatically change the Last Night to reflect that. As with Check Ins, it's a good idea to read all warnings carefully.

Now, once you've confirmed the check-out, the Transaction dialog will appear. (This is an option that can be disabled -- if you prefer not to see the Transactions dialog automatically every time you do a check in, you can turn it off in Maintenance | Program Options | Prompts.) You can verify that their balance has been paid and make adjustments or payments as needed, and print out a new receipt if they need one.

(You also have the chance to adjust the Last Night, just in case none of the previous choices were quite correct.)

If you cancel a reservation by mistake (or if they change their mind and come back the same day), you can undo the check-out through the Reservation Details dialog. Just click on the Checked Out box and confirm the prompt. (You can then go into Transactions and make additions, etc.) Manager access is required for this function.

Transactions

The section *Working with Transactions* covers transactions in depth, so this section will just cover the basics of how transactions can be entered for reservations.

Any time a function is performed on a reservation that might result in additional charges or payments, the Transaction Dialog will be used to enter new transactions. It also shows previous transactions for review or editing. In addition to managing transactions, you can set the Paid-Through date and even change the reservation dates directly from this dialog. If necessary, you can use the Reservation Details button to view or edit any reservation or customer details.

The other function of this dialog is to print a receipt. You can print a receipt with all transactions, or just the new ones added since you opened this dialog.

You can bring up the Transactions dialog at any time from Transactions the right-click menu of tab views, or from New / Edit Transactions... on the Reservation Details dialog. You can also select Transactions | Add New Transactions on the main menu or use the cash register toolbar icon, but this is much more difficult because it will open the generic transaction dialog, from which you'll need to Find Reservation first, then Enter New Transactions for the above Reservation.

Making Changes to a Reservation from the Rack

Overview

Most changes to a reservation's dates or status can be done from the Rack view -- you can change the first and last nights, block dates, change sites, confirm, guarantee, and cancel a reservation all from the right-click menu on the Rack. An appropriate confirmation dialog will appear for any change, and in many cases you'll be automatically prompted for necessary details.

Of course you can also perform many of these through the Reservation Details dialog, but getting familiar with the right-click menu will help streamline the operations by minimizing the steps required.

Changing the Reservation Dates

You can change the first and last dates of a reservation at any time, as well as the Blocked date. (Exception -- the First Night cannot be changed if a reservation is checked in, and none of the dates can be changed if the reservation is checked out).

The Blocked date allows you to block a site for extra days after a reservation's official Last Night, in case the customer wants to stay longer. This can be at your discretion to allow some slack for typical stay-overs, or by customer request. Many of the dialogs (New Reservation, Change Site, Transactions, etc.) allow date changes directly, but most changes can be made easily on the Rack view itself. See the *Rack* section for command details.

When changing the first night, last night, or blocked dates from the Rack view, you will get a simple confirmation so you can accept or abort the change. Not much can go wrong here, since only "valid" options will be available when right-clicking on the Rack.

When changing the dates from the Reservation Details dialog, you are able to manually change any of the dates to any date you like, whether it makes "sense" or not (for instance, you can change the start date of a reservation that's already checked in). However, some validation will be done when you try to save the reservation changes to avoid problems like reversed dates and conflicting reservations.

If you do change the start date of a reservation that's not checked in yet, you will also be asked if they will be staying the same number of nights. If you answer No, the reservation's original Last Night will remain the same. If you answer Yes, then the Last Night will be adjusted automatically to make the number of days the same. The Blocked date, if present, will not be affected (unless the end date is now later than the original blocked date, in which case the blocked date will be cleared). If you find this prompt more of a burden than a help (i.e. if you nearly always answer No), then you can turn it off in Maintenance | Program Options | Prompts.

Changing Site Assignments

You can change the site assignment from the right-click menu in the tab view, or from the Assign or Change Site... button on the Reservation Details dialog.

When changing the site or assigning a site to an unassigned reservation, a dialog just like the New Reservation dialog will be used so you can do all of the same site preferences and vacancy checks to find a new site. Everything else will be filled in, so just click the Done button when finished selecting the new site.

Note that when changing a site, only one site can be selected for the reservation. To add additional sites you will need to use the Add Concurrent (Linked) Reservations option, which is only available from the right-click menu on the tab views.

Swapping Sites

If you have two existing reservations that you need to swap the sites for, there is an easy way to do this. First use the Assign or Change Site function as described above. Once that dialog opens up, locate the site/reservation you want to swap with. Since it's occupied, you can't just double-click on that site to assign it because that would create a conflict. However you can right-click on that reservation in that site and select Swap Sites with this reservation. If the swap would create a conflict with other reservations, or if the other reservation is flagged as "Don't Move", it won't be allowed. Otherwise it will ask for confirmation -- answer Yes and the swap will be done.

Changing the Customer

This function is only available on the Rack if the reservation is a Group reservation, and is not yet checked in. (It's also available on the Reservation Details dialog for any reservation, but requires Manager access if the reservation is already checked in.)

While not recommended in general, changing the customer with this function is much preferred to just editing the customer details to change the actual customer this reservation belongs to -- you should never just overwrite customer information with that of another customer, in case that customer record has been used for other reservations or transactions.

This will open a Find Customer dialog, where you can select an existing customer or click "Cancel / Add New" to enter a new customer for the reservation.

If the reservation already has transactions, all transactions will be transferred to the new customer, which could result in that customer's balance to be wrong -- make sure you know what the consequences will be (if the reservation has a balance due, it can result in the wrong customer getting a bill).

Also note that if this reservation is currently synchronized with others, it will no longer be synchronized after changing the customer. This is done without warning, since that's usually what you want to do (if it's a different customer, they're likely to check in or out at different times).

Canceling a Reservation

A cancelled reservation is not deleted from the system, it simply has a **Cancelled** flag set so that it will not show up on certain reports. You can cancel a reservation using the Cancel option on the right-click menus in the tab views, or you can click on the **Cancelled** check box on a Reservation Details dialog.

When making a cancellation, you will have a chance to enter notes about the cancellation (it's always a good idea to note who requested the cancellation and why, so you have some proof in case they forget that they cancelled it). The notes will be part of the reservation's Notes field, so if notes already exist you can add the cancellation notes to the end of the existing notes. Also remember that the date, time, and operator making the cancellation will be recorded, which you can see on the **Reservation Details** dialog.

After entering any notes, the Transaction dialog will appear so that you can check the transactions for any refund needed or delete any charges for the reservation, or charge a cancellation fee. Don't leave unpaid charges on a cancelled reservation or else your reports will be inaccurate, showing charges that were never paid. When canceling a reservation, the account should be "balanced out" so that the balance due is \$0.00.

You can "un-cancel" a reservation if a cancellation is done by mistake, or if the customer changes their mind. You can do this from the right-click menus or by clicking on the **Cancelled** check box in the Reservation Details dialog (which would already be checked). A simple confirmation will be shown, at which point you simply click **Yes** to undo the cancellation. Manager access is required for this function.

Confirming a Reservation

To the Campground Master software, a *confirmed* reservation is simply a reservation with the **Confirmed** flag set. This flag is used to set the status color on the tab views, and optionally affect the showing of "available" reservations according to the Function options (see *Program Options and Settings*). For your campground, you may have no specific rules for requiring confirmations, so the use of this flag is at your discretion. (You could even use it for something totally different which you want to see coded as a different color on the tab views, although this could be confusing since the wording for the flag cannot be changed on the menus or dialogs.)

For now we'll assume that it means that a customer has confirmed their stay, so its confidence is greater than a mere "pending" reservation. This could be on a new reservation if it's close enough to the time of their stay, or done later on a reservation made months in advance. You can mark a reservation as "confirmed" from the right-click menu on the tab views, or from the Reservation Details dialog by clicking on the **Confirmed** check box. Note that the Confirm option will not be available on the right-click dialog if the reservation is already confirmed or if it has been Guaranteed (which is presumed to be a higher level of confidence than Confirmed). Of course it also won't be available if the reservation has already been checked in or checked out.

A simple prompt will ask you to confirm the change. If you are supporting the Estimated Arrival Time field, you may also want to set this when confirming the reservation. This field is only available on the [Reservation Details](#) dialog.

If you want to undo a confirmation (to revert the reservation back to a *pending* state), open the Reservation Details dialog and check the Pending box (or uncheck the Confirmed box).

Guaranteeing a Reservation

Like Confirmations, a guarantee is basically a flag in the reservation that affects the color coding in the tab views and may have an affect on showing "available" reservations (according to Rack options). In general it's assumed to mean that the customer has provided a deposit or credit card information to guarantee the reservation, giving it greater confidence. You can mark a reservation as "guaranteed" from the right-click menu on the tab views, or from the Reservation Details dialog by clicking on the [Guaranteed](#) check box.

In addition to the flag, there is a special field for the guarantee information (typically the credit card information, but it can be anything you want). When you guarantee a reservation, a dialog will appear for you to enter this information. If the customer has previously guaranteed a reservation, that information will be shown here automatically (the guarantee information is actually stored with the customer, not the reservation). You can leave it as is or edit it as needed. While this information is shown on the [Reservation Details](#) dialog for reference, it cannot be edited there since it's actually customer information. To edit the information after making the guarantee, you need to go to [Customer Details...](#), or use [Customer Details](#) from the menus.

Once you have entered the guarantee information (if required), you also have the option to open the Transactions dialog so you can enter a deposit if you need to (which also goes to the "Deposit" function automatically), or you can simply [Save](#) the information.

If you want to undo a guarantee (to revert the reservation back to just pending or confirmed), open the Reservation Details dialog and check the Pending box (or uncheck the Guaranteed box). You will be asked to confirm the change. Manager access is required for this function.

Splitting Reservations

This function is only available from the right-click menu on the Rack view. The typical reasons to split a reservation include moving a customer to a different site in the middle of their stay, or adding a gap in the reservation when the customer leaves and will come back shortly.

Either way, you are actually creating an additional reservation. The [Split](#) function simplifies the process by copying all of the details to the new reservation automatically, and adjusting the dates so that the original reservation ends early (on the day before the split) and the new reservation starts the next day (the day of the split). Note that a split must be done in the normal range of the reservation, it can't be done in a Blocked date range. If you have other concurrent reservations synchronized with this one then they will also be split (assuming you confirm the prompt to keep them synchronized), resulting in two sets of synchronized reservations.

If the split date is today or in the future, the second half will not be checked in yet (it will show a Pending status), even if the original reservation was checked in. If the split date is in the past, then both halves will keep the checked-in status (assuming it is checked in now). If both halves are the same status after the split, it may still appear like a continuous reservation on the Rack (if you don't have the start & end "bars" enabled), since it's still all one color and the same name. If you lose track of the split, you can double-click on the reservation to see the First and Last dates, so you can tell which of the two reservations you're clicking on.

After splitting the reservation, you can make the necessary changes to the new reservation just like any other reservation (change the start date, change the site, etc.).

Also note that transactions are not carried over in the split, since they can only be related to one reservation. If the original reservation had an outstanding balance, you may want to adjust its transactions to balance out to the day of the split and move the appropriate charges to the new reservation.

However, the Paid-Through date is automatically adjusted appropriately. If the original reservation was paid through the split date or later, that date will carry over to the new reservation and the old reservation will show that it's paid through its new last date. If the original reservation was not paid through the split date, then the new reservation will not have a paid-through date (none of it has been paid).

Adding Concurrent (Linked) Reservations

This function is only available from the right-click menu on the Rack view, and is used to add more synchronized reservations to a group or other linked reservations. Start by right-clicking on the reservation you want to add the additional site(s) to. (Concurrent reservations also result from selecting multiple sites when making the original reservation.) The functionality is similar to having multiple sites in one reservation, such as for groups registered under one name (e.g. caravans registered by the wagon master), or for one customer taking two or more "sites" (e.g. a trailer storage site or boat dock in addition to the RV site).

When this function is selected, you will see a dialog that looks (and is) just like the New Reservation dialog. All reservation information will be filled in (dates, customer information, etc.). All you need to do is select the additional sites, either from the mini-rack or with Quick-Pick. All of the same site preference filtering and vacancy-checking functions are available. Note that the [Waiting List](#), [Cannot Book](#) and [Continue to Details...](#) buttons are disabled when making concurrent reservations. The additional reservations must have the same status as the original, so for instance if the original reservation was on the waiting list, the new concurrent ones will be too.

Once sites are linked in this way, you will be prompted to synchronize any changes you make to any of the reservations (copy changes to all of the linked reservations). So whenever you make a change to the reservation that needs to be synchronized, such as dates, status, or indicator flags, you will be prompted to synchronize the reservations. See the [Synchronizing Linked Reservations](#) section for more details.

Linked reservations are listed on some of the dialogs for reference, such as the Transactions dialog and the Reservation Details dialog. However the list may be truncated if more than 4 or 5 are linked. You will also see a list of linked reservations whenever you double-click on a tabbed view to see the reservation Quick-Info.

Note: You cannot add concurrent reservations to a reservation that's already linked to others but is *not* synchronized. This would result in two sets of synchronized reservations all linked together, which is not supported. If you already have reservations linked together and want to add more to the group, be sure to select one of the synchronized reservations (double-click on one and you will be able see which ones are synchronized).

Synchronizing Linked Reservations

Any time changes are made to a reservation that is synchronized with other linked reservations (*concurrent* reservations, such as groups), you will be prompted with an option to keep the reservations synchronizes. This means that the same changes will be made to all of the linked/synchronized reservations, so they will all keep identical dates and status. It's very important to answer this correctly, since making the wrong choice can end up with a mess that's time-consuming to straighten out.

Answering No (to not keep them synchronized) will make the changes only to the one reservation, but more importantly it will make this reservation a stand-alone reservation, no longer synchronized to the other(s). It will still be linked for reference and they will appear in each others' lists of linked reservations, but changes will not be synchronized (and the "synchronized" indication will be cleared). If this is done by mistake, the only recourse is to delete this reservation and add a new concurrent reservation to the rest of the group. If this was the Master for the synchronized reservations, the next one "in line" will become the new Master for any remaining synchronized reservations.

You will usually want to answer Yes to keep them synchronized, but there are some cases where you might want to un-synchronize them on purpose. For instance if one person in the party leaves early or stays later, you can separate him from the group. Another example is if you have two reservations linked for one person, such as a campsite and a trailer storage space, and you need to end one of them prematurely (e.g. he sells the trailer). The proper procedure in this case would be to Split the reservation on the date you want to cancel one of them, and tell it not to keep them synchronized. The first half of the split would remain synchronized, but the second half would be separated so you can cancel one of them.

The Reservation Details Dialog

This is the main dialog for editing everything about a reservation. While most common changes can be done outside this dialog (with right-click functions, for instance), some functions are only available here and nowhere else. This dialog also has a number of information fields that are not editable, such as the time, date, and operator who made the reservation, checked it in, checked it out, or cancelled it.

From this dialog you can open further dialogs to see [Customer Details](#) or [Transaction History](#), and to add [New Transactions](#), [Manage Guests](#), [Assign or Change the Site](#), or edit [Site Preferences](#). You can also [Print](#) a reservation record or [Delete](#) the reservation completely (if you're logged in as an Administrator), or [Find](#) a reservation if you're browsing from the main menu (see the Find Reservation Dialog below).

Note that the [Cancel](#) button on this dialog does not cancel the reservation! It only cancels any changes you have made to the fields, so you can avoid making changes by mistake. If you're just looking at the reservation and have not planned to make changes, you should use [Cancel](#) just to make sure you don't save changes made by errant keystrokes. If you make changes that you want to keep, use the [Save](#) button. (If you actually want to cancel the reservation, click the [Cancelled](#) check box to start the cancellation process.)

Indicator Flags

The indicator flags are mostly used just to determine the color that is used for the reservation on the Rack view, etc. With just a couple exceptions (see below), they are not used for any other purpose, so you can set them as you see fit.

The [Don't Move](#) flag can be set if you want to avoid moving this reservation to another site. This will be flagged as such for color coding, plus the Assign Site functions will be disabled for this reservation.

The [Group](#) flag is typically set to indicate that a reservation is part of a large group. The program only uses this flag to set a special color on the tab views, so how this flag is used is entirely up to the user. This flag does not affect the linking of reservations or guest lists in any way.

The [Extended Stay](#) flag is typically set to indicate that a reservation is for a long period, usually for people who pay monthly or have no specific departure date. It's not connected with the reservation's Last Night field or affect site availability, but can be filtered for batch receipts, etc. to help indicate reservations that need to be billed monthly. This also indicates that the reservation is to be billed monthly, if you use the Monthly Billing feature.

The Free Site (or Complimentary Site) flag is typically set for reservations that are not paying for their site, such as work-campers and campground managers. Like the other flags it sets the color for the tab views, but it is also used in the program to indicate that the reservation never has Payments Due (it won't show up on that tab view unless it has other outstanding transaction charges).

Linked Reservations

If this reservation is linked with other reservations, they will be shown here in a drop-down list. (Although the list appears "enabled", you cannot change the contents of the list.) If this reservation is the Master of a synchronized list of reservations, it will show "Master of:" in front of the linked reservations.

If this is part of a group, the Group Leader (group name) will be shown, and there will also be a button to View the group leader's customer details. The group leader cannot be changed (although its customer details can, but that would of course affect anything else that customer is used for.)

Customer Details

This button will open the Customer Details dialog for the reservation's customer, so you can make additional changes or see more customer details. See *Working with Customers* for more information on this. If the customer has the "Warning Flag" set, you will see a red warning icon next to this button.

Note that there is no way to actually change which customer record is assigned to the reservation. You can change any of the customer details, but remember that those changes will be permanent in the customer database. If you selected the wrong customer for a reservation and want to change it once it's made, the only way is to delete the existing reservation and start over with a new reservation. (You could also cancel the reservation instead of deleting it, but that would result in a cancellation in your reports that wasn't really a customer cancellation.)

Change to a Different Customer

This button allows you to change which customer this reservation is for. This should only be used if a mistake is made initially, or when checking in individuals from a group. If the reservation is already checked in, Manager access is required to change the customer record. To change the customer, click this button, which will open a Find Customer dialog. You can then select an existing customer, or click "Cancel / Add New" to enter a new customer for the reservation.

(While not recommended in general, changing the customer with this function is much preferred to just editing the customer details to change the actual customer this reservation belongs to -- you should never just overwrite customer information with that of another customer, in case that customer record has been used for other reservations or transactions.)

If the reservation already has transactions, all transactions will be transferred to the new customer, which could result in that customer's balance to be wrong -- make sure you know what the consequences will be (if the reservation has a balance due, it can result in the wrong customer getting a bill).

Also note that if this reservation is currently synchronized with others, it will no longer be synchronized after changing the customer. This is done without warning, since that's usually what you want to do (if it's a different customer, they're likely to check in or out at different times).

Managing Guests

A reservation's guest list is actually just a list of additional customer records. Thus every guest will be in your customer database as well. Also note that this reservation will appear on the Reservation History of each of the guests as well. There is no limit to the number of guests you can add to a reservation, and they are optional. The purpose of adding guests is simply to have information on everyone in your campground, particularly adults. This can be for security purposes or simply to allow gift shop transactions to be applied to the guest.

The guest management function opens a new dialog that lists current guests, lets you add new ones or select existing customers to be guests, view guest details, remove guests from the list, or print the list. This list only shows the last name, first name, one of their phone numbers and their notes. However you can view or edit complete customer information for them using [View Selected Guest Details](#) (click on the guest's line in the grid, then click the View button).

To add a guest that is already in your customer database, use the [Find a Guest](#) button. This operates just like the Find Customer function when making a reservation. The selected customer will be added to the guest list.

To add a guest that's not yet in the database, use the [Add a New Guest](#) button. This will open a Customer Details dialog where you can enter as much information as you like.

To remove a guest from the list, click on the guest's line in the grid and then [Remove Selected Guest](#). This will not delete the guest's record in the database, it will only remove it from this reservation's guest list.

Depending on how your park handles guests, you may want to use the Day Pass function for guests instead of adding them as a reservation "guest". Because day passes are for specific dates, they are useful for temporary guests -- especially if you charge guests for visiting. While you won't be able to link them to the reservation or site they're visiting, you can add that information to their notes.

Transaction History

This will open a list of all transactions for this reservation, in a raw table format. This can be used for reference, or to print a complete transaction history. (To edit the transactions or print a receipt, use the [New Transactions](#) option.) If any old transactions have been purged, a "Total Payments" amount will be shown for transactions previously purged. This will tell you how much was paid toward the reservation in the past that's not in the current "live" transaction list. (Since only "balanced" transactions can be purged, you can assume that there was no outstanding balance for the purged transactions, so the amount "charged" was equal to the amount paid).

Reservation Status

The current status of the reservation will be indicated by a check-box. You can change the status by simply checking a different box (only those possible will be enabled), or by un-checking the box that's checked to un-do a status like Checked In, Checked Out, Cancelled, etc. (Note that Day Pass reservations cannot be changed.) Any appropriate confirmation prompts or other messages will appear, the same as if the action is done from the right-click functions on the rack. Most Undo operations require a Manager access level.

Notes

Notes will be shown as a single line here, but you can enter multiple-line notes as long as you like by clicking the "..." button at the end of the notes entry field. This will open a separate Notes dialog for entering the notes. Any current notes will of course be shown, and the cursor placed at the end so you can begin entering notes immediately. When multi-line notes are displayed as a single line, for instance on the Detail dialogs or in lists, each line break will be shown as a double-backslash (" \ ").

Printing a Reservation

You can print an entire reservation record with the Print button. This will print a simple table with each field name and value, so it's only meant for reference purposes.

Deleting a Reservation

If you made a mistake in a reservation that can't be undone (such as selecting the wrong customer) or if you made a duplicate reservation by mistake, you may want to delete it entirely. Only an operator with Administrator access can delete a reservation, since it's a permanent deletion and can affect the integrity of the database if the wrong reservation is deleted. (This is another reason to avoid using an Administrator login unless you know that you need to make such changes.)

To delete a reservation, simply click the Delete button. You will be asked to confirm the permanent deletion. However, if the reservation has any transactions then it cannot be deleted. This is a safeguard to prevent deleting financial information by accident. Generally if a reservation has had transactions then it wasn't a mistake and should not be deleted, but perhaps just needs to be checked out or cancelled instead. If you absolutely want to delete the reservation and all of its transactions, you can go to the New Transactions dialog, delete all of the transactions, and then delete the reservation.

When a reservation is deleted, all references to it are cleaned up as well. This includes removing it from the reservation history of the customer and any guests, and removing it from any linked reservations. If this was the "Linked Master" for synchronized reservations, the next synchronized reservation in line will become the new master.

The Notes Dialog

The Notes dialog is used to enter multi-line notes, or just to get a better view of long notes. It is invoked from any dialog that has a "..." button at the end of a Notes entry field, such as the Site Details, Customer Details, Reservation Details, or New Reservation.

Any current notes will of course be shown here, and the cursor will be placed at the end so you can begin adding to the notes immediately.

Simply enter the notes as you want them to appear, using the Enter key to start new lines. Long lines will wrap around automatically in this dialog, but be aware that when showing the notes in the Quick-info pop-up windows, the lines won't wrap and may cause the window to be very wide.

When multi-line notes are displayed as a single line, for instance on the Detail dialogs or in lists, each line break will be shown as a double-backslash (" \ "). Also note that extra "blank" lines at the beginning or end will be removed automatically.

Since both the Enter key and Ctrl-Enter are used to start new lines in the notes entry box, you must use **Alt-S** or click on the Save button to close this dialog.

The Find Reservation Dialog

This dialog can be opened directly from the main menu ([Reservations](#) | [Find Reservation](#)), or from the Reservation Details dialog if that was opened from the main menu. It's also used for listing all reservations for a given site or conflicting reservations (from the right-click menu on reports), so you can view or edit the details of each reservation.

The Find Reservation dialog allows you to search the reservation database in a variety of ways. By default, it will show all reservations that are on site during the next week ([Filter by Date](#) selected, starting today, ending 7 days later, and [Resv period](#) selected). In many cases, this may be sufficient to find what you're looking for (you can sort by any column shown to help you look), but several other options are available. In addition to (or instead of) filtering by the reservation dates or the date the reservation was made, you can use Site Filtering (to select sites, site types, classes, and parks), and also filter by the Last Name, Confirmation Number, Site Name, Operator, or Notes.

To select one of these latter filters, first check the [Filter by](#) box. The default is Last Name, but you can change that in the drop-down box next to [Filter by](#). Then enter the text in the next field, which will either be labeled "Starting With" or "Containing" depending on the search type selected.

When searching by Last Name or Operator, you don't have to enter the whole name, just the first part. Of course the more letters you enter, the more precise the search will be. After entering a few letters, press **Tab** or **Enter** (or click [Search](#)). A list of matches will show up, and you can scroll down the list to select another one using the arrow keys. When searching by Confirmation Number, Site Name, or Notes, any reservation containing the text entered will match (it doesn't have to start with the text entered).

If you prefer to see the entire list of reservations (not recommended for large lists of several thousand), you can uncheck both the [Filter By](#) option and the [Filter by date](#) option. All reservations will be shown, and you can sort by any column to help you find a customer.

Once a list is displayed, you can print the entire list by just clicking the [Print List](#) button. Therefore this dialog can also be used to print out filtered reservation lists. You can also use [Export List](#) to export the data to a CSV file.

Once you find the desired reservation, select it by clicking the line with the mouse. The Search button will change to either [View](#) or [Use](#), depending on what it will do (determined by how you came to the Find Reservation dialog). This click View or Use, or double-click on the reservation line, to complete the selection and perform the indicated function. (If only one reservation is displayed, you can simply press **Enter**). This will open the Reservation Details dialog for that reservation. (A shortcut to using the mouse to click on a reservation is to press **Alt-G**, which will jump "into" the grid, then use the up/down arrow keys to select a reservation.)

7 Working with Customers

Overview

Remember that "Reservations" are **not** the same as "Customers" in Campground Master. "Reservations" contain the information about a single stay for a particular customer, such as the dates, status, payments, site and so forth. If you want to work with the information pertaining to a particular stay, you should refer to Working with Reservations.

Adding Customers

During normal operations you should just enter new customer information on the New Reservation dialog as you make a reservation. To enter customer information without making a reservation, such as entering your old customer records, use the [Customers](#) | [Add a New Customer](#) from the main menu. You can also use the Add Customer button (faces icon) on the toolbar.

At this point you should see Record ID: <NEW RECORD> in the dialog, indicating that you are starting a new customer record. If you see any other record ID, then you are editing an existing customer record. The cursor should already be in the Last Name field, so you can just start entering the information, using the **Tab** key between each field. You can use **Shift-Tab** to back up a field, and of course you can use the mouse to jump to any field you like.

Note that most customer fields are free-form, so you can enter the text in any format you like and any length needed. For example, in the phone number fields you can put "Cell: 123-4567" or "555-1212 ext. 54". The only exceptions to this are the drop-down fields, which must be one of the selections in the list, and the numeric fields, including the Rig Size and the Adults, Children, etc. (Length fields can have a single-quote character, for "feet", but it is not necessary.) If any value is not valid, you will be warned before leaving the dialog and will get a chance to correct it. Any extra "spaces" typed at the beginning or end of entries are automatically removed, to avoid problems when sorting and searching for customers.

When you're finished with a customer's information, you can click [Save](#) -- or you can immediately click [Add New](#) to add another record so customers can be entered one after another. Each time you click [Add New](#), the current customer info will be saved and the cursor will immediately jump to the Last Name field to help speed entry. Another time-saver is to use **Alt-A** on the keyboard instead of using the mouse to click [Add New](#).

If you decide not to enter a new customer, even after entering some information, click the [Cancel](#) button. You will be warned if any new information would be lost by canceling the changes to the record, so you can abort the [Cancel](#) and get back to the dialog to [Save](#) it instead.

The more information you can enter for a customer, the better. Besides the obvious reasons for having more information, some of the information will help save time later. For instance, some of the values are automatically transferred to reservations when making a new reservation, such as Adults, Children, Rig Type, and Notes.

There is no limit to the number of customers you can enter. You could enter every old customer you have information for, just in case they come back. But remember that the more customers you have in the database, the longer it will take to find a particular customer (for instance, locating a particular "Smith" when making a new reservation). It can also slow down operations, like loading up the [Find Customer](#) list. So a good medium would be to start by entering customers whom you know come back often. (Any currently booked customers and future reservations that are already booked should be entered through the New Reservations dialog so you can enter both customer and reservation information at once.)

Vehicles

In addition to the rig type, etc., up to 4 other vehicles can be entered for a customer. Use these any way you like -- for cars, trailers, boats, bicycles, off-road vehicles or anything else you need to keep track of. The first vehicle ("car") is shown here, but you can enter more by clicking the More Vehicles button. While the fields are free-form, we suggest the license plates be entered as state/license (using 2-letter state codes) just for uniformity and ease of sorting if necessary.

Discounts

The discount options can be used to help select appropriate rental rates. You can enter up to 3 discounts that a customer qualifies for, and optionally enter their membership numbers. The first discount shown will automatically be used when they make a reservation (but can be changed manually if needed), and the appropriate rates for that discount (if defined) will appear in the rates selection list on the Transactions dialog. Also note that if transactions are entered later using a discount that's not one of the 3 the customer has, it will be added to the customer record automatically if there's an empty space for it.

Exclusions

The option for excluding the customer from the mailing list can be used if the customer requests to be removed from your mailing list. While it won't affect printing receipts, you can filter them out when printing mailing labels and envelopes. The E-mail list exclusion will work similarly, although support for E-mailing customers is not present in the current software version.

Warning Flag

The warning flag can be used to black-list customers or for any other purpose where you need to check the customer's information before making a reservation for them (you should indicate the reason for the warning in the Notes field). If this flag is checked, then a bright red warning icon (an exclamation point in a triangle) will appear on this dialog, plus the Reservation Details and the New Reservation dialog when that customer is selected. It doesn't prevent any action, it just warns you that you need to check the notes. You can get a list of all customers with warning flags with the menu function [Customers](#) | [Customers with warning flags](#).

Viewing and Editing Customer Information

To edit any customer, you can use the [Add Customers](#) button (faces icon) on the toolbar or the [Customers](#) | [Customer Details](#) selection on the main menu. You will then need to use the [Find](#) button to get to the one you want to view or edit (see below). If you enter part of the customer's Last Name before clicking [Find](#), then that will automatically be used to do an initial search. (This must be done on a "New Record" -- don't try to do it on top of an existing customer record!)

The quicker way to get to a customer, if you have a current reservation for the customer, may be to find them on the On Site tab or other tab view and use the right-click function [Customer Details](#). Or if you already have a Reservation Details dialog open, just click the [Customer Details](#) button.

In any of these cases, the Customer Details dialog will open. (This is exactly the same dialog that's used to add customers in the previous section.) However, if you open it for a particular customer (from right-click or from a [Customer Details](#) button), there won't be any navigation buttons. Therefore you can only see that one customer. If you used the main menu or the toolbar to view customers, you will see buttons to navigate between customer records. You can use the navigation buttons to step through customer records. The [Previous](#) and [Next](#) buttons step forward or backward, as expected. The button to the left of [Previous](#), which

looks like |<<, will jump to the very first record (it's meant to look like the "back-to-beginning" button on audio tape and CD players). Likewise, the >>| button to the right of [Next](#) will jump to the very end of the database.

At the top you will see something like "Record 5 of 53", and a [Record ID](#). Don't be alarmed if the Record ID doesn't match the record number -- there can be gaps due to deleted customers. The Record ID is a fixed stamp on the record that's used by reservations and transactions to refer to the customer. The other record number is simply a sequential number that is just used to indicate where you are in the database, and is not part of the actual customer record.

See the *Adding Customers* section for more details on entering the customer information. You can also [Print](#) a customer record (which is a raw table with the customer fields).

[New Reservation](#) can be used to immediately make a new reservation. It is unique in that it will save the customer information and close the Customer Details dialog first, and then open the New Reservation dialog with the customer information filled in. (It closes the Customer Details dialog first to avoid circular dialog problems.)

[Reservation History](#) will open a list of reservations that this customer has made or has been a guest of. It contains a summary of the reservations, with their current status flags (checked in, cancelled, etc.). To see more information, you can double-click on it or click once and then click the [View the Selected Reservation Details](#) button, which will open the standard Reservation Details dialog, where you can make changes if you wish. If any old reservations have been purged for this customer, you will see "Reservations" and "Nights" totals for the reservations previously purged. This will tell you how much the customer has stayed in the past that's not in the current "live" reservations list.

Warning -- be careful when going this far to edit reservations, since it's possible to start from the reservation dialog, click to customer details, click to reservation history, and click to edit the same reservation but in a different dialog (you're several layers deep at this point). The results are unpredictable for this circular situation, and depend on whether you click [Save](#) or [Cancel](#) at each step of closing the dialogs.

[New/Edit Transactions](#) can be used to directly enter or edit transactions for this customer. Keep in mind that these transactions will not be associated with a reservation! Only use this if entering non-reservation transactions, such as gift shop purchases.

[Transaction History](#) will open a list of all transactions for this customer (including all transactions made for every reservation by this customer), in a raw table format. This can be used for reference, or to print a complete transaction history. If any old transactions have been purged, a "Total Payments" amount will be shown for transactions previously purged. This will tell you how much the customer has paid in the past that's not in the current "live" transaction list. (Since only "balanced" transactions can be purged, you can assume that there was no outstanding balance for the purged transactions, so the amount "charged" was equal to the amount paid).

When you're finished editing a customer's information you can click [Save](#), or you can click [Cancel](#) (or the **Esc** key) if you were just looking and don't plan to make any changes. If you were editing and decide not to keep changes you've made, click the [Cancel](#) button. You will be warned if any new information would be lost by canceling the changes to the record, so you can abort the [Cancel](#) and get back to the dialog to [Save](#) it instead.

E-mailing a Customer

If the customer has an E-mail address entered, you can click on the blue "E-mail" tag next to it to send them an E-mail. This simply opens your E-mail program (assuming Windows knows your default E-mail program), with the customer's E-mail address already filled in.

Notes

Notes will be shown as a single line here, but you can enter multiple-line notes as long as you like by clicking the "..." button at the end of the notes entry field. This will open a separate Notes dialog for entering the notes (discussed in the *Working with Reservations* section). Any current notes will of course be shown, and the cursor placed at the end so you can begin entering notes immediately. When multi-line notes are displayed as a single line, for instance on the Detail dialogs or in lists, each line break will be shown as a double-backslash (" \ ").

The Find Customer Dialog

If you want to find a particular customer (or print a customer report), you can use the Find button on the Customer Details dialog. If you enter part of the customer's Last Name on the Customer Details dialog before clicking Find, then that will automatically be used to do an initial search. (This must be done on a "New Record" -- don't try to do it on top of an existing customer record!)

You can also get to this by using the Find Customer button from the New Reservation dialog, or by using the main menu selection Customers | Find Customer. If you tend to use Find Customer most of the time before adding a new customer, there is an option to make the customer toolbar icon go directly to Find Customer instead of Add New Customer (see Maintenance | Program Options | Functions).

The Find Customer dialog allows you to search the customer database in a variety of ways. If you don't enter part of a customer's name before clicking Find Customer, then the initial list will either be blank or it will have the entire customer list, depending on the option selected in Maintenance | Program Options | Functions.

Note: If all customers are shown initially, only the most important fields are shown to make it faster (name, city, state, and notes), but after making any filter changes the fields shown will change according to the filter type. For instance if you do want to see all of the fields for all customers then you can check and then uncheck the Filter By box to refresh the list.

If you did enter part of the last name first, then of course the list will already show matching customers.

Regardless of what's shown initially, the default search method ("Filter by") is Last Name, and the cursor will already be in the "Starts With" field ready for you to type a name. You don't have to enter the whole name, just the first part. Of course the more letters you enter, the more precise the search will be. After entering a few letters, press **Tab** or **Enter** (or click "Search"). A list of matches will show up, and the first entry will be selected by default, and you can scroll down the list to select another one using the arrow keys.

If you prefer to see the entire list of customers (not recommended for large lists of several thousand), you can uncheck the "Filter By" option. All customers will be shown with nearly all of their information, and you can sort by any column to help you find a customer.

Other filtering options include address, city, state, zip, country, phone number, E-mail, driver's license, vehicle license, discount type, discount ID, and notes. The searches are somewhat intelligent -- for instance, a phone number search allows you to enter any portion of a phone number, and any punctuation is ignored. For instance, entering "555" will match any phone number (in any of the 3 phone number fields) containing three 5's in a row, even if they are separated like in the number (915) 552-0406. In addition, the list will always show the appropriate fields -- for instance, if you search by zip code, the address fields are displayed but not the phone numbers or licenses.

Once a list is displayed, you can print the entire list by just clicking the [Print List](#) button. Therefore this dialog can also be used to print out filtered customer lists. You can also use [Export List](#) to export the data to a CSV file.

Once you find the desired customer, select it by clicking the line with the mouse and clicking [Use](#) (the Search button automatically changes to Use once a customer is selected), or double-click on the customer line. (If only one customer is displayed, you can simply press **Enter**). This will open the Customer Details dialog for that customer, or if you're making a new reservation it will put that customer information in the reservation. A shortcut to using the mouse to click on a customer is to press **Alt-G**, which will jump "into" the grid, then use the up/down arrow keys to select a customer.

If you don't find a customer or you're finished with finding customers, typically you would click Cancel. In some cases, the Cancel button may show "Cancel / Add New", in which case that will take you right to the Add New Customer dialog ready to enter a new one (this depends on how you got to Find Customer in the first place). This is probably what you want to do in most cases, but if it's not then just Cancel out of that dialog also.

Merge Customers...

You will also see a "Merge Customers.." button in the dialog. This is useful if you see multiple customer entries for a customer that you know are really the same person. This button will be enabled if you select 2 or more customers at once, and will allow you to merge them safely.

Merging Customers

Duplicate customers may be added by accident if the operator doesn't use the Find function often enough when making reservations, or if the customer isn't noticed in the list. Under normal circumstances you would not want to delete one of them, since that would lose any reservations or transactions made with that customer. However, the Merge Customers is a safe way to combine them -- all of their reservations and transactions will also be combined into a single customer.

Merging Customers is done by first using the [Find Customers](#) function to find likely candidates for merging. Duplicates will likely be spotted accidentally on occasion when doing a Find for other reasons, but you can manually search for duplicates to merge any time. Just open the Find Customer dialog and search for all customers with last names starting with "A", for instance, and then go through the list.

If you find multiple entries in the customer list for the same person, select all of the ones to merge (using **Ctrl**-click on each one), and press the Merge Customers button. The Merge dialog will open, listing each of the ones you selected.

Note: Merging can only be done by operators with Manager access level or higher. The Merge Customers button will not be enabled for lower access levels.

The Merge Customers Dialog

The customers selected to be merged are listed in the Merge Customers dialog. Now you will need to select the customer record to "Remain" after the merge. This is important because only the customer details in this remaining record will be saved -- the details in the other customer record(s) will be lost (this does not include reservations and transactions -- those will all be merged into the remaining customer).

Some of the most critical information about each customer is shown in the list to help you make the decision.

Typically you would choose the record with the most up-to-date or most complete information. If you need to see more details, or if you see some information in one that you want to transfer to the one to be kept, you can use the View Customer Details button at the bottom (or double-click on the customer).

Once you're sure that all of the information you need is in a single customer record, make sure that customer is selected (highlighted in dark blue), and click the "OK, Merge!" button. The reservations and transactions from all of the customers will be moved to the selected customer, and rest will be deleted.

Important! The Merge function cannot be reversed! Make sure you have recent backups, especially if you're using the auto-save option.

Customers with Warning Flags

A customer's warning flag can be set on the Customer Details dialog. This report will list all customers in the database with warning flags for a quick reference or to allow printing them out. Since the warning will show up as a bright icon whenever you start a new reservation or view the details for a customer, it's not necessary to use this separate reference most of the time. It's mainly here for convenience in printing the list, but may also be useful for printing a report showing all of the reasons customers get put on warning (the Notes field is shown, which should be used to indicate the reason).

Once the list is shown, you can double-click on any entry to open the Customer Details for that customer, and make any changes if needed, including taking them off the warning list. If you do remove their warning flag, the list will be updated immediately.

Deleting a Customer

If you created a customer by mistake, you may want to delete it entirely. Only an operator with Administrator access can delete a customer, since it is a permanent deletion and can affect the integrity of the database. If you just want to get rid of a duplicate entry, you should use the Merge Customers function instead of just deleting it.

To delete a customer, simply click the Delete button in the Customer Details dialog (available from the Customers main menu or by clicking the Customers toolbar button). You will be asked to confirm the permanent deletion. However if the customer has any transactions or reservations then it cannot be deleted, and you will be notified of the reason. This is a safeguard to prevent deleting financial information or reservation history by accident.

If you absolutely want to delete the customer and all of its transactions and/or reservations, then you can do so by following this procedure (starting at the Customer Details dialog showing the customer to be deleted):

1. Click the Reservation History button.
2. Click on a reservation in the list and click View the Selected Reservation Details.
3. Click on the New Transactions button.
4. If there are any transactions in the list, delete them:
 - a. Click on transaction in the list
 - b. Click on Delete Selected Item(s).
 - c. Repeat steps a and b for each transaction.
5. Click Done on the Transactions dialog.
6. Click Delete on the Reservation Details dialog.
7. Repeat steps 2 through 6 until all reservations are deleted.
8. Click Close on the Reservation History dialog.
9. Click Transaction History to see if there are any more transactions for this customer.
10. If there are no transactions, then Close the history and click Delete to delete the customer.
11. If there are transactions, then you will need to do the following to delete the transactions:
 - a. Close the customer dialog with Save or Cancel.
 - b. Open the New Transaction dialog with Transactions | Add a New Transaction.
 - c. Click Find Customer, locate the customer in the list, click on it, then click Use.
 - d. Click Enter New Transactions for the above Customer.
 - e. Delete transactions as in steps 4 and 5 above.
 - f. Return to the Customer Details dialog, find this customer and click Delete.

Administration note: It is possible to change the customer link for a reservation using the Maintenance | Raw Data Tables | Reservation function, and manipulating the numerical index values. This will not be discussed here since it is very intricate and dangerous. If you feel this is necessary, contact technical support.

8 Working with Transactions

Adding Transactions

There are basically two ways to enter transactions -- either through the Transactions Dialog used for normal charge/payment transactions (for reservations, customers, and unbound transactions), or through separate transaction entry dialogs for Expense and Misc. Income transactions. Note that only operators with Manager access or above can enter Expense or Misc. Income transactions. Any operator with Clerk access or higher may enter other transactions.

How Transactions Work

You may be used to thinking of a "transaction" as being a complete financial deal -- for instance, the rent charges, the taxes, and the payment. In Campground Master, this would be recorded as 3 separate "Transaction" records, essentially one for each line on a receipt. This level of detail allows Campground master to generate a number of very useful and flexible financial reports.

The Campground Master transactions data is a very simple collection of individual transaction "line items". Each record is essentially an individual line item -- a single charge for a number of nights, a sales tax charge, a payment, a refund, and expense entry and so forth. These are tied together into something useful by the way they are linked to reservations and/or customers. Most of the time you will work with the Select Rate(s) function (described later) instead of entering individual charges, but you should still understand how each kind of transaction is used.

You can also use Campground Master to enter all of your campground expenses and miscellaneous income if you like, replacing the functions of a general ledger. You can generate a variety of reports for accounting purposes, such as a detailed expense report for the year or a categorized monthly income and expense report.

Each transaction has a number of fields for classifying, categorizing, calculating, and reporting purposes. The primary field is the **Type**, and then there is a **Category**, a **Description** (you can enter what you like), a **Payment Type**, the **Discount Used** if applicable, a **Quantity**, the **Each**, and **Total** (automatically calculated). Every transaction also has a **Reference** field and a **Notes** field, where you can enter anything you like. Long descriptions should be entered here instead of the Description field, for better receipt formatting.

In addition, every transaction is stamped with the date and time made and the operator who entered it. Expense and Misc. Income transactions also have a **Reference** field where you can enter a check number, invoice number, or any other reference information needed.

For reservations, all transactions for the reservation are linked together so that you have a record of all charges and payments for that reservation. If it's an extended stay, you can add charges and payments as needed for each payment period, and print out a receipt with either a complete history or just the new transactions each time. Although the transactions don't look orderly when viewing the transaction list in the dialogs, the printed receipt will show them properly grouped and subtotaled for a professional-looking statement.

Transactions for reservations (and customers) are typically entered in charge/payment pairs. That is, you add "charge" transactions such as daily rate charges, discounts and taxes, then you add "payment" transactions such as deposits, payments, credits and refunds. In the end, these should all balance out to a zero balance if the account is paid in full. The order of the transactions makes no difference (for instance a deposit is usually entered long before any charges are applied). They will still show up appropriately grouped

on the receipt.

For customers, all transactions are linked together for every reservation the customer has made, plus any reservations that have been entered for the customer outside a reservation. For example you can enter gift shop purchases for a customer and print a separate receipt for that purchase, and it won't show up as part of the reservation transactions. You can also get a list (and print a statement) for all of the customer's past transactions at once, for instance a summary for when they leave.

In addition, you can enter "unbound" transactions. These would include your expenses and miscellaneous income, but also any transactions that don't have customer information, such as a walk-in to buy RV supplies that you don't want to add to your customer database.

Deposit Balance

Deposits are tracked so that the program knows which deposits have actually been applied, rather than just deposits paid. This will primarily be noticed in that whenever a non-deposit transaction is added to a reservation after a deposit, a "Deposit Applied" transaction is automatically inserted. This won't show on receipts and doesn't affect the customer's actual balance, and is only used for reporting and balance-tracking.

There is a "Deposit Account" Quick-Report under Transaction Summary Reports for showing the current deposits account balance (and the running total at any time in the past), and also a Deposit Balance Adjustment function under Maintenance for entering manual adjustments if needed to keep it synchronized with external accounting.

Note that the balance is actually calculated on-the-fly from all transactions in the database. Thus the balance can be shown for any previous day in the database's history.

A/R Balance

As with Deposits, the program can calculate the Accounts Receivable balance at any time. This is essentially based on the total outstanding balances (charges less payments) for all transactions. Deposits are not included until they are Applied, so unapplied advance deposits don't affect the A/R balance.

There is an "Accounts Receivable" Quick-Report under Transaction Summary Reports for showing the current balance (and the running balance at any time in the past), and also an A/R Balance Adjustment function under Maintenance for entering manual adjustments if needed to keep it synchronized with external accounting.

Note that the balance is actually calculated on-the-fly from all transactions in the database. Thus the balance can be shown for any previous day in the database's history. However this also means that any "future" charges (charges added for future reservations) will also be included in the calculation, so if you add charges (or payments) ahead of time for customers not yet arrived, be aware that this will affect your A/R balance.

Transaction Types

Every transaction must be one of the predefined Types. The type of the transaction determines where it appears on receipts, how it is handled for reports, and whether it's a debit or credit to the customer (for receipts and the customer's balance) and to the campground (for reports).

Charge

This is the standard transaction type for any purchase or other charge to the customer. A Charge transaction can have a category (selected from the Transaction Category list you define), a quantity, a price for each, and the total amount (calculated by the software). The description defaults to the category selected for convenience, but can be changed to be more specific.

Charges can also have a Discount Used, which is a selection from the discount types. This is used for generating reports to show how much of the charges were based on each discount type.

Tax

This is similar to a Charge, but is only used for adding taxes to the statement. Besides reporting purposes, it's separate from the Charge type so that taxes can be shown separately on receipts. A Tax transaction will have a category (typically a special selection such as "sales tax" or "hotel tax"), and has quantity/each/total values (see below for a suggestion on these). The description defaults to the same text as the category.

Discount

This is essentially a negative Charge, used for indicating the amount of discount separately from the charge, both for reporting purposes and for the customer's convenience on the receipt. For instance, if the normal rate is \$20.00 and the Good Sam rate is \$19.00, you should enter a Charge of \$20 and a Discount of \$1.00 to get the same result. That way there's no confusion of whether they received the discount rate, they can see exactly how much they saved, and you can generate reports showing how much each discount program is "costing" you.

Discount transactions can have their own category, or you can use the generic "Discount" category. You can set the quantity and each price just like Charges – for instance, enter the number of days for Qty and the discount per day in Each. The Discount Used field will be set appropriately (from the Pick List), and the description defaults to the Discount Used also. Note that Discount transactions will be shown on receipts with a "Discount : " prefix in the description, unless the description already contains the word "Discount".

Payment

This is the general payment type, for a customer paying his bill. It will have a Payment Method (cash, check, Visa, etc.). The Qty is typically left blank, so it just has an each/total value, but a Qty can be entered for special payment types like Traveler's Checks if you prefer. The category is predefined as "Payment" and cannot be changed, and the description defaults to the same as the Payment Method selected in the dialog, but can be changed to something more specific if desired.

Deposit

Deposits are basically the same as payments, just separated for clarity on the receipts and for reporting purposes. In addition, the program keeps track of a "unapplied" deposits as a deposit account balance. Whenever a charge transaction is entered *after* a deposit, a separate Deposit Applied transaction will be inserted to show that this deposit has been applied and is now earned income.

Deposit Applied

This is an automatic transaction -- there is no way to add it manually. It's added whenever a Deposit is "used", i.e. a charge has been added to a reservation that had a deposit. These transactions show an "Each" amount, but they don't affect the customer's balance due (because the Deposit already does), and it won't appear on receipts. The Total on the Transactions dialog will be blank to indicate that it doesn't figure in the balance due.

Credit

Credit transactions are for miscellaneous credits toward an account. This is most often used for coupons or promotions that aren't a monetary payment, but reduce the amount of monetary payment needed. They are treated like a discount in most respects, as they have a Transaction Category but don't have a Payment Method. One distinction from Discounts is that Credits are not automatically taxed like Discounts are. The description should be used to describe the purpose of the credit (bad weather allowance, credit for helping with mowing, etc.), and the description will have a "Credit : " prefix on receipts. Also note that credits are shown in a separate section on receipts, below the sub-total for charges and discounts (and taxes).

Refund

Refunds are essentially negative Payments. They have a Payment Type (how the refund was paid to the customer), and have "Refund" as the category. The description defaults to the payment method but can be changed to show the reason for the refund. You can just enter the amount in Each, or you can use Qty/Each to show more detail and have the total calculated (e.g. 3 days at \$20/day).

Note that even though Refunds are negative payments, the value entered should be positive since it's subtracted from payments.

Expense

Expenses are never associated with reservations or customers. They are individual entries for campground expenses. You can set the category, payment method, description, reference, qty and amount each to whatever you like. You can also enter detailed Notes (a better place to put long descriptions so that reports are formatted better).

Misc. Income

Misc. Income transactions, like Expenses, are never associated with reservations or customers. They are meant to be individual entries for other campground income not recorded elsewhere, such as vending machine income, dump fees, etc. You can set the category, payment (receipt) method, description, reference, qty and amount each to whatever you like. You can also enter detailed Notes (a better place to put long descriptions so that reports are formatted better).

Deposit Adjusted, A/R Adjusted

These transactions are only used when applying an adjustment to the deposit balance or accounts receivable balance (running totals kept within the program). They don't appear on most reports since they don't affect charges or receipts, and are only a factor in bookkeeping.

The Transactions Dialog

Using the Transactions Dialog

No matter how you get to the Transactions dialog, it will already show any previous transactions for the reservation, customer, or previous unbound transactions in the same session (see those sections for details). These will be shown in the transaction grid on the dialog, and will have a white background to show that they are old transaction. Any new transactions entered will be shown with a light yellow background.

To add transactions, simply use the buttons to the left of the transaction grid -- either use the Select Rate(s) function, or select an individual transaction such as Charge, Payment, etc. You can also use the keyboard shortcuts (**Alt-S** for Select Rates, **Alt-A** for Charge, etc.).

Payment Method and Discount Used

When you're ready to start adding transactions, you can go ahead and select a Payment Method and/or Discount first before using one of the transaction buttons, or you can skip these for now. The order is up to you, since you will be prompted for the necessary information when it's needed if you haven't already selected it.

If you have previously used a discount for this reservation/customer, or if the customer has a discount defined, that discount selection will be pre-selected for your convenience. These are simple drop-down lists, and the cursor will start out in Pay Method to make it easy (for instance, you can quickly enter a Visa payment method by pressing the **V** key, then **Tab** to the Discounts used and press **G** for Good Sam).

Setting the Paid-Through Date

Any time a payment is made for reservations, you should verify that the reservation's Paid-Through date is updated appropriately. This is discussed further in the *Reservation Transactions* section.

Selecting Rates

For site rentals and many other common transactions, you will probably have a number of Rates defined to speed the entry process, and to avoid mistakes that can occur if you had to enter the value each time. In fact this will probably be the most often used function in the Transactions dialog.

For more details, see the *Selecting Rates* section.

Entering Individual Transactions

Even with comprehensive rates definitions, you will probably enter most payments and deposits as individual transactions, as well as the occasional special charge, credit, refund, etc. See the *Transaction Types* section for a description of each type.

For more information on manually entering individual transactions, see the Entering Individual Transactions section.

Issuing Refunds

If you need to issue a refund to a customer, there's a recommended procedure to keep things in balance. You must first enter "negative" charges to offset the charges for which you want to give a refund (e.g. for days not stayed or merchandise returned), and then enter a Refund transaction. This will allow the transactions to balance out.

Entering a negative charge can be done either manually (use the Charge function and enter a negative *Quantity*, not a negative amount), or by using Select Rates if it's a rental adjustment. When you select rates, you can enter a negative number for the number of days, or you can use the "Invert amounts" option at the bottom of the Select Rates dialog. If their Last Night has already been adjusted and is earlier than the Paid Through night, then Select Rates will already know that a refund is needed and will use a negative number of days when a rate is selected.

Then you will enter the actual Refund -- the amount to be refunded will already be assumed, since the customer has a credit due from the negative charges entered. See the section on entering Refund Transactions for more details.

Deleting Transactions

It's very easy to delete transactions, both old and new. While this is handy if you click on the wrong transaction type button when adding transactions, it can also be a dangerous thing. To delete a transaction, all you need to do is click on any part of it in the grid and click the Delete Selected Item(s) button. You can delete multiple items at once as well, using **Ctrl**-click or **Shift**-click to select multiple lines.

Note: If you want to give the customer a credit or refund, **don't** just delete transactions to do it! This can result in incorrect reporting, and of course gives no indication of what transpired. It's better to use the refund procedure described above.

Old transactions (any that were added in previous sessions) can only be deleted by Manager-access operators.

You will get one warning prompt, so be sure to answer "No" to the prompt if you don't mean to delete anything. In particular, old transactions can be deleted just as easily as new ones, and you cannot get them back using the Cancel button.

Transaction Details

Normally the transactions list just shows the basic information -- type, category, qty, description, and amounts. However it's sometimes useful to refer to other information, particularly for seeing the dates, reference info and notes of prior transactions. For instance, if you record credit card information in the Reference field for credit card payments, you can refer to prior payment transactions to see the info again (and copy/paste it to a new payment transaction).

To see all of the details for every transaction, just check the Details box above the list. New columns will be added to the list for all of the other details (you will probably need to scroll to the right to see them). These include the Payment Method and Discount Used (when applicable), Check # / Reference, the date, time and operator when it was made, a Set ID, reservation date (if applicable), and Notes. The Set ID is an internal number assigned to each transaction session (only or transactions added after version 1.2 of the program).

If you have Manager access, you can edit some of the data (Check #/Ref, Notes, Payment Method and Discount Used). If you have Administrator access, you can also edit the date, time, and Set ID. The Operator and the Reservation date cannot be changed.

Notes

The Notes field at the bottom can be used to enter general notes about the transactions entered in this session. Any notes entered will be added to **all** of the transactions entered in this session, but will not affect notes in previous transactions. These notes can later be referenced on the Transactions Detail Reports, or in the Transaction History for the customer or reservation.

Finishing Up Transactions

When you're finished entering transactions, you may want to print a receipt (which is also commonly used for a reservation ticket for the office files), or you may be finished and ready to move on. Obviously you can just click one of the Print buttons to print a receipt, or Done if you're finished, or even Cancel if you don't want to save any of the new transactions.

First it should be noted that there are two separate things happening on this dialog -- the transactions and the reservation information. If you change any of the reservation dates at the top, those must be saved as well as the new transactions. So remember this if you click Cancel. The software will ask you if you want to abandon "changes" if you have made any date changes, or if you want to abandon the new "transactions" if you or added transactions, so you will have a pretty good clue as to what would be cancelled. But if you made both date changes and added transaction, then it will only ask about the new transactions.

Now, assuming you are done and/or want to print a receipt, some validation will be done before continuing. For example, it will not allow any transactions without an Each amount. (It will warn you and move the cursor to the transaction amount that needs to be filled in.) It will also check to make sure you have selected a Pay Method if you have any transactions that need one, and a Discount Used if there are any Discount transactions

For more information on printing receipts, invoices and letters, refer to the *Printing Receipts* section.

Selecting Rates

For site rentals and many other common transactions, you will probably have a number of Rates defined to speed the entry process, and to avoid mistakes that can occur if you had to enter the value each time.

When you click the Select Rate(s) button a new dialog will appear, with applicable Rental Rates and Add-Ons shown by default. You can change the Rate Type to see other types or all types using the drop-down list. Some applicable reservation information appears at the bottom of the dialog for reference when selecting rates or entering quantities (the number of nights, discount, and any concurrent/synchronized sites are shown).

Note that the rates shown in the list are based on a lot of different factors in the Rates Setup. If you're not seeing a rate you expect to see, you need to review the rate definition and the reservation. A rate might not appear if the discount type selected is different than defined for the rate, or if the site's type or class is different, or the length of stay is too long or short, or if the reservation date range is outside the rate's season or in the special exclusion dates.

Rate Quick-Finder

If you have the rate codes memorized and prefer using the keyboard, you can select the rate by typing the rate code in the Rate code quick-finder field (the cursor will start there so you can just start typing). When the correct rate is selected, just press **Tab** to move to the Sites or other Qty field if needed, or go ahead and Add the rate (**Alt-A**).

Discount Used

This is a drop-down list of discounts, identical to the discounts on the Transactions dialog. Any previous discount used will be automatically selected here. There are two reasons this selection is duplicated here:

1. When checking in customers, this may be the first dialog that appears (it will "skip" the Transactions dialog if the Options are set up to do so), so you need to be able to select the rate here.
2. It can also be handy to check different discount rates at this point to find the best rate. Just select different discounts and the applicable rates will be shown immediately.

Adding Rates

Just click on the desired rate in the list (or use the quick-finder), change the qty field(s) if necessary, and click Add. If you know that the quantities don't need changed, you can just double-click the rate and it will be added with the default quantities immediately (see below for more about the quantities). Therefore in most cases, such as simple daily rates, all you will need to do is double-click the appropriate rate, then click Done to finish the rates selection.

Quantity Fields

Whenever a rate is highlighted in the rates list, one or more quantity boxes may appear to the right. These depend on the options selected in the rate definition, and can include a period quantity (Day, Week, Month, or Year), a Site quantity, or a simple Qty field (or any combination of these). By default, these will be filled with a number appropriate to the reservation for which you're adding transactions.

For example, the Days quantity will automatically be filled with the number of reservation nights. This assumes that the rate applies to all of the dates of the reservation -- otherwise it will only include the number of days that match the rate definition. Weeks, Months, and Years will be filled with a "truncated" number for the period -- thus a 20-day reservation would show 2 weeks, since it's assumed that you will also add the extra 6 days as a daily rate. (However if the reservation was for less than 7 days and you use a weekly rate, it would still assume that they are paying for 1 week minimum, not 0.)

Note -- the default number of days (or other period) automatically takes into account the paid-through date, and also any previously selected rates (but only during the same Select Rate(s) dialog session -- any charges added previously won't be taken into account unless the Paid Through date has been updated accordingly).

For instance, for a 16-day reservation that has already been paid through the first week, it will start by showing 9 days unpaid (this shows at the bottom of the Rate Selection dialog). If you then add a weekly rate,

it will know that 1 full week has not been paid/charged yet, so the quantity will be 1. After adding that week, when you select a daily rate to complete the charges, it will know that only 2 days are needed at the daily rate. This also works for reversing charges -- if a reservation is checked out and its paid-through date is 2 days later than the last night, selecting the daily rate will correctly assume -2 days.

If the reservation is synchronized with other reservations, the Site quantity will automatically reflect the number of concurrent sites that satisfy that rate's criteria. Keep in mind that a group of reservation may cover more than one site type, so you may have to Add more than one rate to cover all of the concurrent sites.

Once the quantities are verified to be correct, just click Add to add the rate with the quantities shown to the Rates Selected list at the bottom. (Note: If the qty is 0, then Add will not do anything.) The tax amount is automatically calculated and shown along with a total. If you need to correct a rate, highlight the entry in the Rates selected list and click Delete Selected Item(s). Then add the rate again if necessary.

Multiple Rates

You can repeat the rates adding process to select multiple rates of any type before leaving this dialog, and each one will appear in the Rates Selected list at the bottom with an updated quantity. When all needed rates are selected, click Done to accept all of the selected rates and add the rate charges to the New Transactions dialog. In fact, it's recommended that you add all of the rates at once, so that the number of days, weeks, etc. is calculated correctly (it will keep track of the number of days being added for the currently added rates, but if you click Done and then come back into Select rates, it won't remember what rates have already been added).

Metered Rates

For metered electric, gas and water rates, there is a special dialog that appears when you Add the rate. This dialog shows the site name, the previous reading and date, and a button to view the last reservation that read the meter (in case there is a dispute). All you have to do is enter the new reading, and it will add the appropriate rate charge and also update the reading information in the Site record. Any other quantity entries will be ignored (and the rate definition should be fixed to not ask for a quantity).

Other Options

There is an option to Invert amounts of the rates -- this will turn all quantities into negatives, so this can be used to cancel out a charge or for refunds -- however, note that the transaction categories will **not** be changed to "refund" or "credit", so this could affect reporting. If you're not concerned with reporting refunds separately from charges, then this is the easy way to do it. Of course if you're just canceling a reservation, it's probably best to just delete any associated charge transactions directly in the Transaction dialog, rather than adding negative charges.

If you're entering rates for multiple linked reservations, there will be an option to Use separate entries for each site. This is normally selected by default (but can be changed to unselected by default in File | Printing Options), and will result in a separate line-item charge for every site for which you're adding a rate. The separate charges will also include the site name, so the receipt will show a record of all sites that have been charged.

However, there may be times when you prefer not to show separate lines for each site. For instance, if you have many (over 20 or so) sites linked, then the receipt may not hold all of them. Also note that there will be a separate line item for each transaction defined in the rate -- so for instance if the rate includes a Charge, a Discount, and a Credit (e.g. a coupon), then all 3 of these would be duplicated for each linked site.

Finishing Up

When you're done selecting rates, transactions will be generated according to the transaction templates in the rate definitions, plus transactions for any auto-added taxes. These will appear as new transactions in the Transactions dialog, just as if you entered them manually. You can adjust them if necessary or delete any that you added by mistake. (Take care in deleting individual transactions back in the Transactions Dialog, since the tax won't be re-calculated.)

Entering Individual Transactions

Overview

Even with comprehensive rates definitions, you will probably enter most payments and deposits as individual transactions, as well as counter sales and the occasional special charge, credit, refund, etc. (See the Transaction Types section for a description of each type.)

Prompt-for-Details vs. Grid-Entry

There are two different ways transaction information might be entered, depending on the "Prompt for details when entering transactions" option setting in [Maintenance | Program Options | Prompts](#). This option is selected by default, which means that whenever you click one of the transaction-type buttons, a dialog will open for entering the transactions. This is the most user-friendly method, and allows more information to be entered. The option to not use these prompts is really only there for backward-compatibility, since early users of the software may be used to the grid-entry method. The prompt-for-details method will be discussed here, but a section on the grid-entry method appears below for reference.

To enter an individual transaction, just click the appropriate transaction-type button to the left of the transaction table. As soon as you click the button, a dialog will appear with selections and/or fields for entering the data. These dialogs are detailed below.

Regardless of which method is used for entering transactions, you can edit or delete individual transactions in the grid. Just double-click on any cell in the grid to edit it, or click once to select the cell and start typing (what you type will immediately replace the current text). The only things you can't change are the Type (determined by the button you clicked) and the Total (calculated by the software). Those are shown in gray to indicate that they can't be edited.

Generally only the "new" transactions (those added during this dialog session) can be edited or deleted. The old transactions from previous dialog sessions can be edited or deleted only if you have Manager access or above.

Charge, Discount and Credit Transactions

Charges and Discounts are essentially the same thing, except that a discount is treated as a negative charge, and must have a "Discount Used" associated with it. The typical use for Discount transactions would be for discounted rates or items, for which you would enter the normal price as a Charge and then add the Discount as a separate transaction. This is helpful both for reporting and tracking discounts given and also for indicating the amount of discount on the customer's receipt.

Credit transactions are similar to Discounts in that they are basically negative Charges, but there are a couple important differences -- Credit transactions cannot be automatically taxed, and they don't have a "Discount Used" associated with them. Credit transactions are typically used for things like coupons (which don't usually reduce the sales tax, for instance), or for other special credits to a customer like that have nothing to do with using a discount club. Also, Credit transactions will appear on the receipt in a separate section below the sub-total for charges, discounts, and taxes.

Enter Charge Information

When this dialog opens, focus will be in the Transaction Category list. You must select an appropriate category for the charge, then you can press **Enter** or **Tab** to move to the description field.

Note that the description will automatically default to the name of the category you selected. You can leave it at this or change it to whatever you like. It's recommended to keep descriptions fairly short so that they fit on the receipts, since there is a limited amount of room. The text size on the receipt will be shrunk to make it fit, but it can only shrink to a certain size, and it doesn't appear professional when one long entry is in smaller text than all of the others. About the size of the normal "Item Description" header is a good rule of thumb.

Also note that if you change the description then you should eliminate the existing text because the category may still appear on the receipt (depending on an option set in [File | Printing Options](#)). For instance, if you change the description of a Gift Shop charge, don't leave "Gift Shop" in the description. Make it something like "Flower Basket", and the receipt will show either "Flower Basket" or "Gift Shop: Flower Basket", depending on the printing option.

Next you will enter the Quantity and the Each dollar amount. When entering dollar values, you don't need to enter the dollar sign (\$) -- it will be added for you. Also note that the Quantity can be any number, including decimal numbers like 1.75. You can also choose to leave the Quantity blank, and a single quantity will be assumed.

Finally, you need to select the taxes that apply. Any taxes selected here will result in automatic Tax transaction entries, so you don't have to enter taxes manually. If default taxes have already been set up in the Taxes Setup, then the default tax(es) will already be selected. Make any changes needed, then click **Save** (or you can use **Ctrl-Enter**, or just press **Enter** repeatedly until it gets to the Save button and then it will save the charge.)

When completed, you will see the Charge transaction and possibly one or more Tax transactions appear in the Transaction dialog. If the reservation had an unapplied Deposit transaction, you will also see a "Deposit Applied" transaction inserted, which simply indicates that the deposit has now been applied to charges.

If you made a mistake and need to make changes, you can either Delete the new transactions and do the Charge again, or just click on the field in the grid that needs to be corrected and enter the new value. be careful about making changes, since the Tax will **not** be re-calculated! If an amount needs to be changed, it's best to Delete the Charge and all associated Tax transactions, and then re-enter the Charge so it recalculates the tax.

Don't worry about having multiple tax transactions when you're entering more than one charge or discount -- they will be combined on the receipt so only won tax transaction appears, provided the "Combine taxes" option ([File | Printing Options](#)) is selected.

Enter Discount Information / Select Discount Used

The main difference when entering a Discount transaction is that when you click the Discount button, if you haven't already selected a "Discount used" on the Transaction dialog then a list of discounts will be shown to choose from. (If the reservation or customer used a discount previously, it will already be selected so you don't have to select it again). Just select the appropriate discount (with the arrow keys or mouse) and click OK or press **Enter**. You can also double-click the discount to do it in a single step.

Then the same dialog will appear as for Charge transactions, described above. Note that you can select a category just like Charges, or you can select the generic "Discount" category. This is up to you, and only affects reporting. We recommend selecting the same category as you did for the charge corresponding to this discount, so you can have more detailed reporting.

The Description will default to the Discount Used, rather than the category. This can also be changed if desired, but it looks best on receipts to show the type of discount used.

Make sure you enter the "Each" amount for the discount as a positive value -- it will be subtracted from charges, but the entry must be made as a positive amount. For instance, just enter "5" to give a \$5.00 discount.

Corresponding Discount and Tax transactions will be generated as they are for charges.

Note that Discount transactions will be shown on receipts with a "Discount : " prefix in the description, unless the description already contains the word "Discount".

Enter Credit Information

Entering a credit is just like entering a Charge or Discount. However you won't be prompted for a Discount Used, and there will be no tax selections. Just select a category (which defaults to a generic "Credit" category, but you can change it), change the description if desired, and enter the Quantity (if > 1) and Each amount. Again, the amount should be entered as a positive value even though it will be subtracted from the charges.

Note that Credit transaction descriptions will always be prefixed by "Credit : " on the receipts, and they will appear in a separate section below charges and discounts.

Tax Transactions

Taxes are usually handled automatically when selecting rates or entering charges. However you may have an occasional need to enter a tax manually.

To enter a manual tax, just click the Tax button on the Transactions dialog. If no Tax Rates are defined for the database, an error will be shown. Otherwise, you will see the Enter Tax Information dialog.

Enter Tax Information

First you will select a tax category from the list. When you select a category, notice that the Tax Rate shown will automatically change to the rate defined for the taxes. When you have the tax category selected, just press **Tab** or **Enter** to jump to the Amount field. If there were any charge or discount transactions already entered, the amount will already have the total assumed to be taxed. If this is correct, just click Save. If you need to adjust the amount to be taxed, just enter it and then click Save.

The tax transaction will be added to the Transactions dialog. Note that Tax transactions are handled differently in that the "Qty" field is actually the dollar amount to be taxed, and the "Each" field is the tax rate. This won't affect the way you enter the tax with this dialog, but be aware of this when you are looking at the entries in the grid.

Payment, Deposit, and Refund Transactions

Payments, Deposits and Refunds are all entered exactly the same way. The only difference you will notice is the default in the Amount field when the dialog opens.

Enter Payment Information

First you will select a Payment Method from the list. If a payment method was already selected for transactions (or if a previous payment transaction was entered), the previous payment method will already be selected. Then just press **Enter** or **Tab** to go to the Description field.

Note that the Description will automatically default to the name of the payment method you selected. You can leave it at this or change it to whatever you like. It's recommended to keep descriptions fairly short so that they fit on the receipts, since there is a limited amount of room. Note that the description will always be preceded by "Payment : " on the receipt, so you don't need to repeat that. (Likewise, Deposits and Refunds will be prefixed by the transaction type on receipts.)

The Quantity field is usually left blank, but you may enter a quantity if you prefer. This might make sense for special types of payment like Traveler's Checks or campground membership coupons.

The Amount field will be automatically set to the customer's current balance, since most of the time the balance will be paid in full. Be sure to change this if needed.

If you are accepting cash or a check that's not exactly the amount due, you can use the Amount Tendered field to enter the amount actually received. This will calculate the change due and show it on the dialog. Note that this information is not stored with the transactions -- it is only provided for convenience.

The Ref / Check # field can be used for anything you like (or left blank). Most often this is used for credit card information or a check number. If the payment type is "Check" (or "Cheque"), then the number entered here will automatically be added to the description for the receipt. If you don't want it there, then you can go back to the description field and change it before clicking Save.

Note that the Ref / Check # field does not show on receipts, so it is private. You can view it later by checking the "Details" box on the Transactions dialog, and it will also appear in the Detailed Transaction reports.

Enter Deposit Information

Deposits are entered the same way as payments, except that the Amount will not have a default value. Just select a payment type and enter an amount, and click Save.

Note that when you add a deposit, it's not "Applied" yet -- while it does show up on the customer's balance due (as a credit), it won't affect the overall A/R balance. It's added to the overall Deposits balance until it's applied. When a charge transaction is entered *after* a deposit, then a separate Deposit Applied transaction will be inserted to show that this deposit has been applied and is now earned income.

Enter Refund Information

Refunds are entered the same way as payments, except that the Amount will default to *negative* balance due. This is because the balance due itself should be negative at the time you enter the refund, indicating that a balance is due the customer. Thus the Amount should actually be a positive value, equal to the amount to be refunded. (Make sure you enter a positive amount here if you enter it manually.)

Reminder: If you need to issue a refund to a customer, there's a recommended procedure to keep things in balance. You must first enter "negative" charges to offset the charges for which you want to give a refund (e.g. for days not stayed or merchandise returned), and then enter a Refund transaction. This will allow the transactions to balance out. Entering a negative charge can be done either manually (use the Charge function and enter a negative *Quantity*, not a negative amount), or by using Select Rates if it's a rental adjustment. After entering the negative charge transactions, then you can use this Refund function to enter the amount refunded.

Grid-Entry Method

As mentioned before, this is the "old" way of entering transactions. The differences are described briefly here. This only applies if the prompt-for-details option is disabled.

When a transaction-type button is clicked, a new transaction of that type will appear in the grid, often with some information already filled in and with the next suggested entry field ready to edit. For instance, click Charge and the category list for the new charge transaction will be opened for your selection (using the key shortcuts is fastest, but you can also use down-arrow or the mouse to select one).

As another example, clicking the Payment button will fill in the category and description with suggested values, and fill in the Total Amount Due as the payment amount (no Qty is needed). Just press Tab to complete the entry, or you may type a different amount to replace the default amount.

Note that for Payments, the Payment Method for that transaction will be set to the current value of the Payment Method selection. (If you haven't selected a payment method yet, a dialog will prompt for the payment method to be used first.) Thus you can enter multiple payment transactions with different payment methods by changing the Payment Method drop-down between transactions.

When entering values, you don't need to enter the dollar sign (\$) – it will be added for you. Also note that Qty can be any number, including decimal numbers like 1.75. Clicking the buttons for other transaction types will fill in fields with the program's best guess according to the type.

You'll also notice that the cells will grow as needed to accommodate longer categories, values and descriptions (sometimes requiring you to scroll to see the Total), and you can add as many transactions as necessary despite the size of the list (it will scroll as needed). It's recommended to keep descriptions fairly short so that they fit on the receipts, since there is a limited amount of room. The text size will be shrunk to make it fit, but it can only shrink to a certain size, and it doesn't appear professional when one long entry is smaller than all of the others. About the size of the normal "Item Descriptions" header in the dialog is a good rule of thumb. Also note that while the description often defaults to the category (in charge transactions, for instance), if you change the description then you should eliminate the existing text because the category may still appear on the receipt (depending on an option set in [File | Printing Options](#)). For instance, if you change the description of a Gift Shop charge, don't leave "Gift Shop" in the description. Make it something like "Flower Basket", and the receipt will still show "Gift Shop: Flower Basket".

Taxes Special Handling

Tax transactions have special handling in the dialog to speed the tax entry process. First it will see if you have Taxes set up (Maintenance | Park Setup | Taxes). If so, then it will show a selection of the defined tax categories. Simply select the appropriate tax and the selected rate will appear in the Each column. By default, it will also automatically put the total of all new Charge transactions in the Qty field (adjusted for any Discount transactions). The tax will then be the result in Total because it simply multiplies the Qty by the Each price. If the incorrect taxable amount is in the Qty field, you can back up to change that.

One common problem with this automation is when you have some charges that are taxable and some that aren't, you have to change the taxable amount in the Qty field. One way to avoid this is to always enter taxable transactions first, then the Tax, and then the non-taxable transactions. Remember that the order won't matter since the Tax transactions are separated on the receipt. Of course if you've defined Rates for everything with proper taxes, then you won't even have to enter taxes manually. Another problem is if you have prior charges that were already taxed, it doesn't take that into account and will attempt to tax all charges again.

If for any reason you calculate tax separately or don't like the automation, you can enter Tax before any other charge transactions and enter the tax amount in Each. Although the Qty will show "0", the software will assume this means "no qty information" rather than multiplying by zero. Also note that if you don't have Taxes set up and have no categories with "Tax" in them, you will have to select a category yourself for Tax transactions. This could be anything you want it to be, perhaps the category for the charges being taxed.

Printing Receipts

You can print receipts from the transaction dialog at any time, whether you have entered new transactions or not. This can be used to print additional receipts or summary statements for the customer.

You should first select the Receipt Type, if the default is not appropriate. The default will be the type selected in [File | Printing Options](#), and the Ticket form is the original default. Just select the desired type in the drop-down box before clicking one of the Print buttons to change the style that prints (this will not change the default for next time). For details on the different formats, see the *Receipt Types* section.

Once the receipt type is selected, you can print the receipt. There are two choices for printing:

Print Reservation Receipt will print a receipt with all of the transactions shown, old and new.

Print Only Some Transactions will print the same kind of receipt but with only certain transactions. There are 3 different choices for this.

Print...New -- If you have added new transactions in this dialog session (they will be in yellow), then only those will be printed. If you have not entered any transactions since opening the Transactions dialog, then

this function will print all transactions added in the previous session. Thus you can use this to re-print the last "new" receipt.

Print...Since last paid-in-full -- This will generally print any transactions since the last full payment was made. Technically it will find the last "zero-balance" point in the transactions and print any after that point. Since the order of the transactions affects this, there may be cases where it doesn't correctly find what you would consider the last paid-in-full point (for instance if a new charge is added before they make a payment for previous charges, without paying for the new charge to zero the balance).

Print...Since date -- This allows you to print transactions added since a given date (including those added on the given date). This is most useful to work around problems of payment order mentioned above, or if you need to print an invoice for multiple meter readings or other charges added in different sessions.

Information on Receipts and Invoices

Receipts are much different than other reports printed in Campground Master. They are "forms" rather than a grid, so they don't use most of the Print options (Black & White, Fit to Page, etc.). The receipt contains much of the reservation information (confirmation number, number of nights, customer info, vehicle information, site info, etc.), plus a standard disclaimer text, park information (from the Park record), and in some cases an "Additional Notes" section. (If the reservation is not yet assigned to a site, then the first Park record information will be used by default.) If the Check-in and/or Check-out time fields are enabled for Park records, then the receipts will also show these for the customers information. It will also show the check-out date, so they are clear about what date they actually need to leave. If you don't want to show these on the receipt, then you need to disable these fields under Maintenance | Data Field Definitions | Park Fields.

The statement will first list all Charge and Discount transactions, and a sub-total for them. Next it will list taxes if there are any, and Total Charges. Then it will list any payments, deposits, discounts and refunds, and a balance due or statement total. It will also show the Paid Through date for the reservation if there is one, as a reminder to the customer when the next payment might be due. If you're printing only New transactions rather than all of them, then the receipt will also show any previous balance (from prior transactions) and the total balance due.

There should be plenty of room for all transactions in most situations. Because these receipts are often folded in half and put up in slots for each site in the campground office, the software will attempt to fit the transactions in the top half of the page, shrinking the text if needed. However it can only shrink it to a certain extent (to remain readable), so at some point it will continue down the page if a lot transactions are present.

If there are so many transactions that it won't fit on the page, they will simply be cut off, as there is currently no allowance for a second page for receipts. (Approximately 45 to 50 transactions will fit on a page.) If this happens (most likely for a complete statement on extended stays), you could split the reservation at some point and thus start a new set of transactions. Or you could manually reduce the number of transactions by **very carefully** combining multiple charges and payments into single transactions and deleting the extras. Splitting the reservation would be the preferred method. It shouldn't be necessary more often than once per year if they pay every month, and it would be good to "close" the reservation at the end of the year and start over anyway, for reporting purposes.

Receipt Types

There are four basic receipt types:

Ticket form -- This type was designed to look like a common printed form, familiar to many campgrounds doing hand-written tickets. This is also the only type that will contain the Additional Notes section, which comes from the Park record. There is also a no-color form which will print faster, and also forms with the Site and Dates on the left-hand side (which may work better when folded for showing in windows, etc.). To customize the Notice section of the receipts, see [Maintenance](#) | [Park Setup](#) | [Notice message](#).

Full-page invoice -- this is designed for a full-size page (Letter, A4, etc.), and prints a professional-looking invoice with the word "Invoice" at the top. The customer's address position can be adjusted for use with window envelopes (see [File](#) | [Printing Options](#)). There is also a no-lines version that will print faster, which doesn't put lines around the transaction table. To customize the Notice section of the receipts, see [Maintenance](#) | [Park Setup](#) | [Notice message](#).

Quick-receipt -- this is a basic fast-printing receipt, with no lines or color. It is also small and will print on half-pages or small paper sizes like A5 (landscape mode). This format does not include the "Notice" and customer signature sections like the Ticket and Invoice forms.

Confirmation letter -- This is in the form of a letter, designed for use as a reservation confirmation. It has the transactions table like the other receipts (with no lines, for a more letter-like appearance), and also includes a customizable text section for the confirmation notice (see [Maintenance](#) | [Park Setup](#) | [Confirmation letter text](#)) as well as a Notice at the bottom (see [Maintenance](#) | [Park Setup](#) | [Notice message](#)). The Notice will not include a customer signature line as it does on invoices and receipts. The customer's address position can also be adjusted for use with window envelopes (see [File](#) | [Printing Options](#)).

3" Receipt Printer -- This is generally only used for retail-type receipt printers, typically using a 3" or smaller paper roll. This will print a special format suitable for a narrow printer, so it could also be used with any small-format paper slips. The transactions are printed on two lines instead of one so there is room for the description. If your printer does graphics and non-native (TrueType) fonts well enough, then you may be able to use the first (non-native) option. Otherwise, you may need to use the "native font" option for more readable printing. Make sure you have the printer's native font and number of columns set up in [File](#) | [Printing Options](#) if you use the native font option.

Note that there is no special provision for a paper cutter on receipt printers. If the driver for your printer has an "automatic" cutting function which knows when the printing is finished, that should work, but otherwise a paper cutter is not currently supported.

Window Tag -- This is a special form used to print a form suitable for placing in vehicle windows. It includes the park name & address (small), plus the Site name, first night, and last night in large font. This can be printed on plain paper (typically folded in half after printing, or on special long tags fed in the printer like envelopes, or even a 3" receipt printer in landscape mode (if it supports TrueType fonts). If the paper is large enough to be folded in half (e.g. larger than about 6" tall), then you can fill the bottom half with rules and other text (see [Maintenance](#) | [Park Setup](#) | [Window Tag bottom text](#)).

Note that while a window tag is not technically a receipt, it can only be printed from the same functions receipts are printed -- the Transactions dialog, [Reports](#) | [Reservation Receipts](#), and the right-click printing functions such as [Print for this Reservation](#) | [Receipt](#).

Reservation Transactions

Access to the Transactions dialog for a reservation is available in several places. The simplest way to get to it is to click on [Transactions](#) in the right-click menu of the tab views (for the appropriate reservation, of course). If you're already in a Reservation Details dialog, then you can simply click the New/Edit Transactions button. You will also get the Transactions dialog automatically when performing certain functions like checking in, checking out, and canceling a reservation.

You can also get to it through the main menu ([Transactions](#) | [Add new Transaction](#)). However you will then need to use [Find Reservation](#) to locate the reservation for which to make the transaction.

Note for concurrent (synchronized) reservations -- Since transactions can only be linked to one reservation, typically you would use only one of the reservations for all of the transactions when one person is responsible for them all. However, this can result in some inconsistencies in transaction reports that are grouped by Site Type or Site (all of the charges and payments will appear on one site, even if the linked reservation is on a different type, such as a Cabin and a Boat Dock). The only way to avoid the inconsistencies would be to enter separate transactions on each reservation, but that would require you to print multiple receipts for the customer. There isn't a good solution to this, just be aware of the advantages and disadvantages of the two ways of doing this.

Also note that when entering reservations for synchronized reservations, the software will warn you if you're not adding them to the "master" reservation. It's recommended to keep them all with the master when possible. When adding rates, you can add the charges for all of the concurrent reservations at once, so it's easy to keep them with the master. The exception to this is the meter transactions (electric meter, water meter, etc.). These must stay with the corresponding site, so they will be added to each reservation separately. Thus it would work best to keep transactions separate when a reservation will have meter charges.

Using the Transactions Dialog for Reservations

At the top of the Transactions dialog is a "For Reservation" box, containing the reservation information most likely to be needed when determining the rates. In addition to some typical reservation fields, it shows the number of nights in the reservation, any concurrent reservation sites, and the Paid-Through date.

The Paid-Through date is of special importance -- before finishing transactions, you should verify that this is correct. If the box next to the date is not checked (and the text is gray), make sure the box is checked so that the date is active. For convenience, there is a [Paid Thru Last Date](#) button which will automatically put the reservation's Last Night in the Paid Through date, to indicate that it's paid in full. Also note that if you do enter a payment and forget to set (or change) the paid-through date, you will get a warning prompt when you click [Done](#). The prompt will give you the option to automatically make it paid through the last date (most likely), or to not adjust the paid-through date, or to go back and change it yourself.

Also note that any of the reservation dates can be changed at this time, but use caution since you can't see the Rack to verify vacancy (you will be warned if a conflict is created). You can also use [Reservation Details](#) button to get to the Reservation Details dialog and make any additional changes necessary (although this button will be disabled if you got to the Transaction dialog from the Reservation Details dialog).

For further details, refer to the *Transactions Dialog* section.

Customer Transactions

You may occasionally want to make transactions that are applied to a customer but not to a reservation, such as gift shop purchases. To do this, you will need to use the Transaction button on the toolbar (the cash register), or [Transactions | Add New Transaction](#) from the main menu.

You will then need to use [Find Customer](#) to locate the customer for which to make the transaction. (This works the same as Find Customer in New Reservation dialogs -- sort by the appropriate column, find the customer, click on it and click Use.) Once you're back to the New Transaction dialog, just click the button to [Enter Transactions..](#)

At this point, the Transactions Dialog will appear, just like for reservations. It functions in every way like the reservations dialog, with the exception that the customer information will be shown instead of the reservation at the top (there is nothing to edit here, but you can go to [Customer Details](#)). You will see any previous transactions for this customer, including any transactions for reservations this customer has made. Therefore you could use this to print a transaction receipt/statement for the customer that covers all of his past reservations.

Another difference is the receipt appearance, even though it's the same format as the reservation receipt. The Site and first/last nights area will be blank, the disclaimer/signature area will not be shown, and the park information will use the first Park defined in the database (since there is no reservation and thus no associated site to get the park information from).

One final thing to remember is that transactions here will **not** be reflected in any of the customer's reservations. This may be important for "balancing" reservations -- don't enter a payment for reservation charges here because the reservation will still show a balance due. You should get to Transactions through the appropriate reservation to enter any reservation charges or transactions.

For further details, see the *Transactions Dialog* section.

Unbound Transactions

You may occasionally want to make transactions that are not applied to a customer or a reservation, such as gift shop purchases by walk-in customers (no need to clutter the customer database with non-campers or strangers). To do this, you will need to use the Transaction button on the toolbar (the cash register), or [Transactions | Add New Transaction](#) from the main menu. Then you may need to click the button to [Enter Unbound Charge/Payment Transactions with no customer information](#).

At this point, the familiar Transactions dialog will appear, just like for reservations and customers. The main difference is that there is no customer or reservation information at the top. Another difference is the receipt appearance, even though it's the same general format as the reservation or customer receipt. It will only show the park information, (the first Park defined in the database will be used, if you have multiple Parks set up).

If you do Select Rates for unbound transactions, the Merchandise rate type will be selected by default, since you're most likely entering counter sales.

The Deposit button will be disabled for unbound transactions -- deposits cannot be properly tracked for unbound transactions (and don't really make sense), so they are not allowed.

Since unbound transactions are not linked to a customer or reservation, they will only appear in the Transactions report (tab view) once you've entered them -- there is no other "transaction history" function for unbound transactions. If necessary, you can edit an unbound transaction by locating it on the Transaction report and using the Transactions option on the right-click menu. All transactions entered at the same time (one Transaction dialog session) will still be grouped together, so for instance you can make changes to a counter sale and print out a complete new receipt. (Note: this only applies to unbound transactions entered with Campground Master version 1.2 or later -- previous versions did not support the grouping.)

For further details, see the *Transactions Dialog* section.

Misc. Income and Expense Transactions

These transactions are different than others in that they are not done in charge/payment pairs, don't have separate tax and discount entries, and so forth. They are single transaction entries, like entries in a ledger. As such, you won't use the same grid-style transaction dialog as you do for reservation and customer transactions.

To enter these transactions, you can use the Transaction button on the toolbar (the cash register), or you can use the separate menu functions to Enter an Expense Transaction or Enter a Misc. Income Transaction from the Transactions main menu. If you use the Transaction button, then click on the appropriate button at the bottom of the dialog to enter an expense or misc. income transaction. Note that the operator will need to have a Manager access level or higher to enter these transactions -- the menu/button options to enter them will be disabled otherwise.

At this point you will get a small dialog for either expenses or income (they look the same, just with different wording). Here you can enter the transaction date (defaulting to today but you can use it to enter old transactions easily), the payment or receipt method, check # or other reference, category, description, total amount and any notes.

These fields have all been covered in other sections and work the same here, except that you'll notice that no other transactions have a field for Check # / Reference. This is only used for these ledger-type transactions, and you can use any text you like in this field. You'll also notice that there is no Qty/Each, just one Total Amount field. As with others, no dollar sign is needed here, just enter an amount like "123.95" or "100".

After entering the transaction data, just click Save (or Cancel to abort it). When you view the Transactions tab, you will see the new transaction (assuming you're viewing the date entered in the transaction dialog).

Monthly Billing

This function is available under Transactions on the main menu, and is used for adding monthly charges to all extended reservations.

Overview

Only reservations with the Extended Stay flag will be used in monthly billing, so make sure that you set this flag (when making the new reservation or through Reservation Details) for any monthly-billed reservation, and also make sure it's not set by accident for reservations that pay in full on arrival even if they are staying several months.

When making reservations that will be billed monthly, you will want to be consistent as to how far out you reserve the site (setting the Last Night of the reservation). The Monthlies Options settings have several options available to make this automatic for monthly reservations.

Note that this is a very "simple" one-month-billing function. It will add one month's charges to all current extended-stay reservations (subject to paid-through date filtering), regardless of the actual reservation dates. Thus it's important to make sure that any reservations that should no longer be billed are either checked out (if they are gone) or have been changed to non-extended-stay. (Even if they have been monthly before, if they will be leaving in less than a month then you should remove the extended-stay flag and handle their last month's charges separately.)

Also note that it will not attempt to "catch up" charges for a reservation no matter how long it has been since the last charges were added or paid -- only one month will be charged. Thus it's important to keep up to date with billing. (However, by individually selecting reservations in the list and adding charges, you can manually add as many months as needed to correct missed billings.)

The table on this dialog shows the basic reservation information, plus the current balance due and the new charges that will be applied for this month's billing. If you want to print this as a report or export it, you can use the [Print List](#) or [Export List](#) buttons. Note that the New Charges amount will remain even after charges are applied, although the Current Balance amount will change to include the new charges.

As with other tables, you can click on any column header to sort the records by that column.

Rates Setup Requirements

Monthly billing uses the defined Rates, so you don't need to specify the monthly rate for each and every reservation. (This also allows price changes to be automatic for everyone). In order for monthly billing charges to be correct, you must have the Rates set up properly. The primary rule is that you make sure there is no "duplication" of rates. If more than one rate definition applies to a reservation, they will all be added. This is actually useful, to allow multiple charges to be added at once -- for instance you may have one base rate and then an add-on rate for extra people, and you would want both to be applied. However, if more than one basic Rental Rate applies, it can result in double billing.

Only rates that have the "Use for monthly billing" flag set will be considered for monthly billing. This helps in avoiding duplicate rates, since you can define a separate set of rates for monthly billing that won't normally be used for daily reservations. Also setting the \geq number of days to something like 60 or more will help keep these rates out of the normal rates selection lists. The rates for monthly billing must also have a rate type of Rental Rate or Add On.

Seasonal rates can also be a problem. The important thing here is that the previous Paid-Thru date of the reservation is used to determine the start date of the next month billed. If you have seasonal rates, it gets complicated if a reservation billing month spans 2 seasons. If you always bill even months (the 1st through the end of the month), then if your rates' season dates are also set up this way then it will work fine. Otherwise, you will have to do the charges manually for the month surrounding a season change. Of course, it's also important that the paid-through date for a reservation be correct to avoid billing mistakes.

If you use any discounts for monthly rates, make sure each reservation has its Discount Used set properly. You will also have to make sure that you have a separate rate set up for every discount type you've defined in the pick lists, even if it doesn't affect the rate. Otherwise, a reservation with a discount used that doesn't have a specific rate defined won't get charged. This can't be solved by simply leaving one rate with the "Applies to Discount" blank, since that would get applied to all discounted rates as well, resulting in duplicate charges -- you must select the "Only applies if no discount used" option for the undiscounted rate to avoid duplication.

If you need to charge a special rate for someone (perhaps a promotional deal, or if they have been a long-term resident that you allow to stay for an older rate), then the only way to do it without handling it manually each month is to set up a special rate for them. Since the rates can't apply to an individual, you need to have some other way of indicating that the special rate be applied to them, One way is to set up a special Discount and define a rate for that discount.

Another way to do special rates would be to use an "add-on" rate. They would be charged the base rate along with the rest, but by defining an add-on rate (use it a negative Charge transaction to discount the rate), you can apply a special discount for selected reservations according to a reservation attribute field. There are many "extra" attribute fields that can be redefined for this use. For instance, change the "Close to Diner" attribute to "Grandfathered rate", and make the rate apply to that field. Then just set that attribute to "must have" in the Site Preferences for the reservations to be grandfathered.

Paid-through Filtering

The first thing to do when preparing monthly billing is set the paid-through filter properly. This will always default to the current day, so only reservations that are already due will be included (probably only useful if you run monthly billing every day, or only on the date that every reservation is due.) Reservations will be filtered by their start date if they have no paid-through date. Typically you will set this date to at least a week in advance to bill those coming due, or set it to the end of the month to bill all those due on the 1st. To aid in end-of-month billing, there is a button to automatically set the date to the end of the month.

Options

The options selected here will be remembered each time you use Monthly Billing.

Exclude reservations not yet checked in -- if you don't want to pre-bill monthlies that haven't yet arrived, check this option.

Show synchronized concurrent reservations -- This will allow you to see not only the master reservations to be billed, but also all synchronized reservations. Note that this does not affect which reservations the charges are applied to or printed, but allows you to see the New Charges broken out by site.

Handle synchronized reservations individually -- If this is checked, then charges will be added to each reservation individually (and individual invoices printed) for synchronized reservations. While this is normally not done for short-term reservations (the "master" usually takes the charges for all of the synchronized sites), there is an important reason to do it for monthly billing -- if any of the synchronized sites has meter charges, those cannot be combined into the master so you will need to print separate invoices for those anyway. If synchronized sites are always non-metered (e.g. a storage space) then it would be OK, but otherwise it's recommended that synchronized sites be handled separately for monthly billing.

Editing and Selecting Individual Reservations

There may be times when you see some reservations that shouldn't be billed, perhaps because they're leaving, or perhaps they only pay every 3 months. If a reservation is leaving, or for any reason should not ever be billed monthly again, you should edit the reservation and uncheck its Extended Stay flag. This will remove it from the monthly billing list. To edit a reservation, just double-click on its line in the table, which will open the Reservation Details dialog.

If there are some reservations that shouldn't be billed this time but should be billed in the future, or if you need to print bills for just certain reservations, you can do this by selecting individual reservations in the table. Use Ctrl-Click to select one or more lines. Only those selected will be affected by any of the button functions below the table -- extending, charging, or printing. (If none are selected, then it is assumed you want to use all of them -- there is no need to select them all.)

Extending Reservations Automatically

At some point you may need to extend all of the monthly reservations to keep the site reserved. Depending on how you set the dates initially (see the Monthlies Options under Maintenance | Program Options), you may want to do this every month, or perhaps just extend them for another year at the end of each year. Either way, all you need to do is click the [Extend All 1 Month](#) button. You can click it as many times as needed to add additional months -- you will see the Last Night advance for each reservation. Note that this only changes the Last Night for the reservations, not the Blocked date.

If extending a reservation will cause a conflict, an error message will be displayed and that reservation will not be extended (the others will still be extended). You will need to find the conflict and correct before you can extend that reservation.

If a reservation ends on the last day of the month, extending it one month will extend it to the last day of the next month, even if it's a shorter or longer month. However if it ends on any other day of the month, it will extend it to the same day on the next month if possible. (If the next month is too short, it will extend to the last day of that month.)

Adding Charges

Once you're ready to add the charges to the reservations (and have confirmed that the New Charges look correct for all of the reservations), just click the Add Charges button. The charges will automatically be added to each reservation and the Current Balance will be updated in the table.

However, if it's necessary for your accounts receivable that you can't add charges yet but you do want to print invoices for next month, then you can use the Pre-print Invoices function (see below). For instance, you may want to pre-print invoices on the 25th of the month to be mailed out, and then come back later to add the charges on the 1st of the month.

Printing Invoices, etc.

You can print invoices after adding charges, or you can pre-print invoices (show next month's charges without actually adding them to the reservations). You can also print mailing labels and envelopes if needed (these functions will take you to another dialog for printing mailing labels and envelopes, but will not close the monthly billing dialog). As with the other functions, you can select individual reservations to print if needed.

The receipt format will initially default to the selection chosen in [File | Printing Options](#). You can select a different type here, and it will not only affect this session, it will be saved for future monthly billings (but will not affect other receipts). Thus the default receipt type for monthly billing can be different than the type used for normal receipts. See Receipt Types in the *Working with Transactions* section for details on the different types.

There are 4 options for selecting which transactions will be printed on the invoice:

[Print All Transactions](#) -- This prints all transactions for the reservation. For long-term rentals this can grow large quickly, so it may only be appropriate for seasonal or shorter situations.

[Print "new" transactions](#) -- If "Print Invoices" is used, this will print only the new charges added here (or transactions from the last session of monthly billing or the transaction dialog, if you haven't added the monthly charges yet). If "Pre-print Invoices" is used, it will include the new charges *plus* the transactions from the last session.

[Print unpaid/unbalanced transactions](#) -- This is the most common option, and will print any transactions since the last full payment was made. Thus it will also include any previous charges that have not been

paid, whether it's overdue charges or charges for the electric meter, etc. Technically it will find the last "zero-balance" point in the transactions and print any after that point. Since the order of the transactions affects this, there may be cases where it doesn't correctly find what you would consider the last paid-in-full point (for instance if a new charge is added before they make a payment for previous charges, without paying for the new charge to zero the balance).

Print transactions starting this date -- This allows you to print transactions added since a given date (including those added on the given date). This is most useful to work around problems of payment order mentioned above. This would be appropriate for monthly billings if you don't want to include past-due charges or other charges added earlier, even if they aren't paid yet (The invoice will always show any previous balance and new balance due, so it would only exclude the transaction detail for previous transactions.

Finishing Up

Once you've printed the invoices and/or added the charges, there's nothing else you need to do -- just Close the dialog until the next billing time. (You may want to print the report with Print List for reference, of course.)

9 Other Reports

Overview

Specialized reports are found under [Reports](#) on the main menu. There are three different statistical reports that are based on reservations, providing useful statistics to aid in managing and marketing your campground. In addition, there are Meter Reading reports for each type of meter (some or all may be disabled if not supported by your sites), Mailing labels, Envelopes, and Batch Receipt printing. To generate each report, start by clicking the appropriate menu item.

Report Dialog Controls

Each of these reports is created interactively from a dialog. Just select the desired options in the dialog, then click the [Generate Report](#) button. You can then [Print](#) the report, or adjust the options to generate other reports. Whenever you have finished generating reports of a particular type, just [Close](#) the dialog. The last options you selected (except for the dates) will be saved for that report and used as the default the next time you open that report dialog.

The reports are grid-based summary reports similar to the Summary Transaction reports in the Transaction tab. Thus they use the same print option settings and have the same look. One difference is that there is no right-click menu in these report grids (but the common Grid Lines and Orientation options are available in the dialogs). Most of the controls in the three different report dialogs are similar, as detailed here.

Dates

You can select any start and end date for the reports, to filter reservations occurring in the selected date range. There are also helper buttons to quickly select [Month-to-Date](#), [Year-to-Date](#), [Last Month](#) and [Last Year](#) date ranges.

Summarize period

You can summarize the reports by days, months, quarters, or years. This results in one column (or row) for each day, month, or year of the selected date range. Keep in mind that the date range selected takes precedence. So for example if you summarize by month and selected the range 4/1/2001 to 5/1/2001, it will show April and May months in the report but will be reporting for only one day in May due to the 5/1/2001 ending date.

Site/Reservation Filtering

Most of the reports can be filtered by site type/class/park, and also by specific reservation details. This button will open the Reservation Filtering dialog and allow complex reservation selection and/or Site Filtering.

Auto-Generate

By default, you must click the Generate Report before it will calculate a report and fill the grid, since some reports can take a significant time to generate. If you're reporting on a small date range or using a fast enough computer, you can select the auto-generate option so that the report is refreshed every time you change one of the options. This can be useful for experimenting with the controls to see how they affect the report before generating a report for a large date range.

Grid Lines

Any of the reports may have their grid lines turned on or off by checking or unchecking this option.

Dates on Top

The orientation of any report can be flipped with this option (uncheck it to put the dates in rows).

Hide groups with zero totals

The wording is slightly different according to each report, but the option does basically the same for each report. It will prevent showing group rows or columns (but not date summaries) that have no possible results for the entire date range. Each report treats this slightly differently. In the Occupancy report, it will hide any site types with no available sites in the date range (according to the other options). In the How-Heard report, it will hide any sources that had no reservations reporting that source. In the Unfulfilled Reservations report, it will hide any of the reservation statuses that had no reservations with the given status.

Show as Percentages

Any of the reports can show either percentages or total number of reservations (or reservation nights). When showing percentages, some of the totals may be an Average percentage rather than a Total percentage. (If they are totals, then they should add up to 100% for that row or column). If there are no possible sites/reservations for a given cell total, it will show dashes (---).

If not showing as percentages, each cell will have two numbers, in the form "80 / 95". The first number is the total number of reservations (or nights) for that value, and the second number is the total that could be possible for that date period (all available site nights for the Occupancy report, or all reservations for that period in the other reports). If there are no possible sites/reservations for a given cell total, it will show dashes (--/--).

Note: a space is included in front of the --/-- values so that it's not interpreted as a date when copied or exported to Excel.

Show total possible sites

This only applies if not showing the report as percentages, and when selected will show the values in fractional format (e.g. "3/6"). This is not by default, but it can be turned off so only the number (e.g. "3") is shown. This is helpful when the data needs to be exported to Excel, for instance, for further manipulation.

Count sites even if unavailable

When this option is available for a report, selecting it will include sites in the calculations for each date even if it's not available for that date, according to its season dates and/or special dates available or unavailable. (It doesn't matter whether the site was "open" on that date or whether had a reservation.) Since this can result in less meaningful results, such as in Occupancy reports, you can disable this so that a site is only counted in the total possible for occupancy for a given date if it's available for that date.

Use all reservation nights (vs. arrivals)

For the How-heard Report and the Unfulfilled Reservations, you can generate statistics one of two ways. The two options can result in very different results, each of which have their advantages, but when the results each way are compared to each other it can be especially useful.

With this option selected, it will count each night of a reservation as a separate "hit", like a separate reservation with the given value or status for each night of the reservation. Thus a reservation lasting 30 nights would count 30 times, while a reservation lasting 2 nights would only count twice. This also means that a reservation starting in May and ending in June would count some for May and some for June in a monthly report.

With this option not selected, every reservation counts only once regardless of its length, and it only counts for the date on which it started. Thus a reservation starting in January and ending in June would only count once, and only for the January total in a monthly report. In fact this can result in many reservations that cover the report's date range being skipped entirely because they started before the date range. (However, this report is much faster to generate.)

The reason to check a report each way is to compare the results. For instance, when looking at "highway signs" results in a How-heard Report, a high percentage based on arrivals and a low percentage based on nights could mean that you get a lot of customers from highway signs, but they only stay a short time compared to other references. This revelation might even affect your advertising decisions because it creates a lot of work and expenses (checking them in and out, small credit card transactions, etc.) for smaller bits of income.

Print

Each report has a [Print](#) button which will print the current report. This may print just the grid, or print the requested envelopes, mailing labels, or receipts, depending on the report type. A preview will be shown before printing if you have the "Always preview reports" option enabled under [File | Printing Options](#).

Export List

Each report has an [Export List](#) button, which can be used to export the currently shown list/grid to a CSV file (see the *Exporting Reports* section for more details). This could be used to get the meter lists into a PDA for taking readings, or for exporting a mailing list to be used in another program.

Occupancy Report

This report will show the percentage of site occupancy (reservations filling the sites) for a given date range. The report can group the results by Site Type or Site Class, or show the results for each individual site.

You can select which site types or classes to report, which will affect the Average Percentage totals for a date period -- for instance if you exclude seldom-used site types like boat docks, your average for the period would more accurately reflect the actual occupancy average. Of course occupancy is averaged for each of the site types as well, so you know precisely how much of each site type is filled.

Counting sites even if they are unavailable is usually not appropriate, but might be useful to indicate what the overall occupancy percentage would be if you made them available the whole time.

When not showing percentages, you can see how many total site-nights were available for each period (sites times the number of nights -- for instance, 30 nights in a month times 100 sites would show 3000 site-nights). It also shows how many were filled for each period. This can help illustrate that 80% resulting from 8 out of 10 is not as significant as 80% resulting from 800 out of 1000.

The averages are calculated from the totals of all groups, so they are weighted accordingly. Thus you can see groups of 80% and 100% average out to 82% rather than the "intuitive" 90%, because there were more possible site nights in the 80% group than the 100% group.

This report shows Average percentages in both total directions (for all site types over the total date range, and for all dates of a given site type). There is no requirement for percentages to total up to 100% as in some other reports, since that can only happen if all sites are full for all nights in the range.

You can also use this report to check occupancy levels for future dates, since it will also count pending reservations already made for the future. (Note however that it can only count reservations that have sites assigned to them.) This can be useful for predicting and preparing for a busy season, or for seeing when you need to do more advertising to fill more spaces, perhaps by sponsoring a special event or sending out coupons in a normally slump period.

How-heard Report

This report shows you the sources of your customers. It will group the totals by each category you have in the How-heard pick-list. It can be useful to see which advertising methods are paying off. You can select which site types to include in the reports, so for instance you can compare results for full-hookup deluxe sites vs. electric/water sites (perhaps to see where the big-spenders are coming from).

The percentages are based on all reservations (or reservation nights) found for each period. In addition to the percentages for each summarized date period, it will show an average percentage for all date periods combined (the entire date range). Since it also includes a category for "no info" (when no How-heard value is selected by the operator), the total of all How-heard categories should be 100% for each date period.

If you have a lot of How-heard sources, you can make the report smaller by hiding those with zero totals -- however, that might hide the critical information of which advertising is producing absolutely no customers!

Unfulfilled Reservations

This report is useful for seeing how many reservations have been "missed" due to customer cancellations, inquiries that did not turn into reservations, and not being able to accommodate customers. It will report percentages (or totals) in five categories:

Could Not Fill (the "couldn't book" flag on reservations)

Cancelled (presumably cancellations by the customer)

Waiting List (couldn't book them but they wanted to know if something came available)

Inquiries (information saved but no reservation made)

Filled or Pending (either successful past reservations or booked future reservations).

The Filled or Pending category is included even though they were not unfulfilled, just so that the totals can be seen for proper perspective.

Note that you can use this report to report on future dates as well as the past, which can indicate when you have a lot of customers already waiting for space (perhaps to prepare some extra sites to take on the demand).

In addition to the percentages for each date period of each category, the average percentage for the entire date range is shown. Since all possible status conditions are covered, the Totals for all categories should be 100% for each date period, as well as the Averages.

If you don't select the Show as Percentages option, you will see the actual number of reservations (or reservation nights) for each of the categories, which can also be useful.

You can also select which site types to report, which would allow you do make comparisons between cancellations of deluxe sites vs. economy sites, for instance.

Meter Reading Reports

These three reports are identical except for which meter fields they report. Any of these reports may be disabled, if the corresponding Site Data Fields for meter support are disabled. They show the site name, the current occupant (the reservation scheduled for today, if any), the last reading date, and the last reading. Reservation access level is required to view this report.

These reports show the current meter reading as well as an input field to "batch" enter new readings (which can also be used for recording the readings on the printed report). If the Rates are set up properly for automatic charge calculation, this is the easiest and quickest way to add meter charges to reservations. It can also be used to adjust the readings for sites with no reservation.

Report Settings

There are 2 filtering options for the reports:

Show only sites with previous readings -- this is selected by default, which generally will be any sites that actually have meters. If you want to see all sites even if they don't have previous meter readings (such as when entering readings for the first time), uncheck this box.

Filter by last reading date -- this allows you to select a date range for the last reading. This is handy for getting a list of meters that need to be read (and customers billed) for the current day or week. By default, the start date will be 45 days ago and the end date will be 25 days ago, so it will show any readings up to 2 weeks "overdue" and any readings that will be "due" within about 5 days (assuming a monthly reading schedule. These dates can be changed as preferred, and the changes will be saved in terms of the number of days prior to the current day (so for instance the 45-to-25 days range is saved, not the actual dates).

The options above are saved and will be used the next time you use any meter reading report.

By default the list is sorted by site, but you can change this to any order you like. Once you have the list showing what you need, you can print the list. There should be plenty of room left on the paper to enter the new reading, so it can be used as a walk-around list.

Functions to enter readings or view details are available on the right-click menu -- click on a Site Name or Reservation Name. You can enter new readings and add the charges to the current reservation, or enter manual adjustments without charging a reservation. You can also view site details or reservation details.

Entering Single Meter Readings

You can manually adjust readings from the right-click menu (Site Details) or by double-clicking on any Site Name. This will open the Site Details dialog, where you can enter a new reading. Remember, however, that entering a reading this way will clear the reservation link so you won't be able to use the "View reservation read by" button, and also does not add charges to a reservation.

Select the Add Meter Charges to Reservation option from the right-click menu, or double-click on the old meter reading, to quickly enter a meter reading and have the appropriate charges added to a reservation. This will take you directly to the Transactions dialog with Select Rates opened up to show the appropriate rates definitions for the meter (electric, gas or water as appropriate). If there is only one rate available, that rate will automatically be used and all you have to do is enter the new reading. Just enter the new reading, and press the "Done (auto-close...)" button on the meter reading entry dialog to immediately close the transactions dialog and get back to the meter list. If you need to enter other charges or want to print a receipt immediately, then instead of using the "Done..." button, click Save after entering the new reading. The Transactions / Rates dialogs will remain open.

You can also open the Reservation Details for the site's current occupant by double-clicking the occupant name. You will then be able to use that dialog's New / Edit Transactions button to add a meter charge for that reservation as above (it just takes a few more steps this way).

After entering a reading (or multiple readings), you can use the Print buttons at the bottom to print receipts, envelopes, or labels for all of the reservations with new readings.

Entering Multiple Meter Readings (Batch Entry)

When many meter readings need to be entered and charges applied to reservations, the batch entry method is quickest. Just click on the empty "Batch Reading Entry" column for the site -- the cell will be blue (selected) -- and type the new reading, then press **Enter** or **Tab** to step to the next row. The new readings will remain in this column and will be in a light yellow color.

Once all of the batch readings are entered, click the "Add Charges & Update Readings" button. Charges will be automatically applied to each of the current reservation (if there is one for the site), and the site will be updated with the new reading. These steps may be repeated to enter more readings if necessary, just don't close the dialog before printing invoices or else it won't remember which ones need to be printed.

There are two Rates Setup requirements for adding meter charges automatically:

1. There must be one and only one meter rate defined (for that meter type) with the "Ask for meter reading" option that will apply to the current reservation on the current date. If there is more than one, an error will be reported and the reading will not be updated. Note that if you have multiple rates defined with different date ranges, it will use the one that applies to the current date, regardless of the reservation's dates.
2. There may also be one meter rate that does not have the "Ask for meter reading" option. This can be used for a non-multiplying "base rate" that applies each time the meter is read.

After all of the readings are entered (using either the single or multiple method), you can print the invoices for all of the new charges, and also print labels or envelopes if needed. Using these buttons will open the appropriate dialogs to print Batch Receipts or Mailing Labels/Envelopes. Further options for printing can be found in those sections. As long as the Meter Reading report dialog is kept open, it will remember which reservations have new charges to be printed so you can use the print functions multiple times as needed.

Note: Be careful about using batch entry to enter "adjustment" readings or charges for short-term customers -- when using the "Add Charges" function, it will assume that the current reservation in each site should be charged for the meter. So if the wrong customer is already on that site when the readings are entered, the charges will be applied to the wrong reservation. In this case you should find the correct reservation and go through its Transactions / Select Rate(s) to enter the new meter reading. Or if it's just an adjustment with no charges to be applied to a reservation, use the Site Details to enter the new reading.

Mailing Labels and Envelopes

The dialogs for these reports are identical, they just print different formats. You can get to this report dialog from the main Report menu or from a right-click menu on a tab view (print an envelope for the selected reservation, or print mailing labels/envelopes for all shown reservations).

Mailing Labels are formatted to the industry standard "30-up" label sheet on Letter size (8.5" x 11") paper -- Avery numbers 8460, 8660, 8920, 8940, etc. While this format cannot be changed, if the labels don't print in the proper position then you may need to adjust the Printer Offsets in [File | Printing Options](#). Experiment with plain paper before using labels.

Envelopes are formatted for a #9 or #10 envelope by default, but can be sized to any envelope by changing the paper size and orientation in [File | Printer Settings | Envelopes](#) and the address offsets in [File | Printing Options](#). You will probably also need to change the Printer Settings for Envelopes to use Landscape orientation if you have to feed them end-wise, besides selecting the proper paper size (e.g. Envelope - #10).

If you're preparing for a mass mailing of an advertisement, you should check the [Filter out "Exclude from Mailings" customers](#) box to eliminate those who do not want mail.

If entering this dialog from the main Reports menu, all customers will be shown in the list to print. If entering from a right-click menu on a tab view, then only those customers from that view will be shown. The [Filter out duplicate customers](#) box is checked by default, since tab views can often show multiple reservations for the same customer. Of course you can always uncheck this, perhaps so that labels and receipts are matched up properly even for those customers with multiple reservations.

You can also filter the customers to print by checking the [Use reservation, with optional filtering](#) box. (This check box is not shown if entering from a right-click on a view, since you're using reservations already.) First this will eliminate any customers that do not have reservation records (customers entered as guests, or who only purchased something in the gift shop, etc.). Then you can further filter the list with the [Reservation Filtering](#) button. Since this filtering is identical to the filtering used for batch-printing receipts, it is described separately below. Note that the filtering options are not saved once the report dialog is closed.

The total number of customers in the list is shown at the bottom. Also note that you can double-click on any line to get the Customer Details dialog, where you could fix an address, check the Exclude from Mailing flag (for instance on ones that have no zip code), or any other changes. The list will be re-generated with any updates you make.

If you would like to print out the list or export the list to a CSV file, use the [Print List](#) or [Export List](#) button. This will print or export the entire contents of the list in the dialog, just as it is shown.

Once you have them filtered as needed, you can trim down the list further by selecting only those customers to print. For instance, it may be handy to sort them by zip code (the default), and select only those records with zip codes. Use the multi-select methods to select multiple records (click / shift-click for a range, ctrl-click for individual lines). If none are selected, all will be printed (the same as selecting all records).

Finally, just click [Print](#) (or press **F8**) to print them.

Reservation Receipts (Batch)

This report dialog is similar to the mailing labels/envelopes dialog. You can get to this report from the main Report menu or from a right-click menu on a tab view (print a receipt for the selected reservation, or print reservation receipts for all shown reservations).

You can filter the reservations to print with the [Filtering](#) button. If entering this report dialog from the Reports main menu, it will show only reservations made today by default. Therefore if you print a batch of confirmation letters for reservations made each day, it's all set (but you may want to further filter out any that have already checked in if you have walk-ins). See below for details on the filtering dialog. Note that the filtering options are not saved once the report dialog is closed.

The total number of reservations in the list is shown at the bottom. Also note that you can double-click on any line to get the Reservation Details dialog, where you could make changes if needed. The list will be re-generated with any updates you make.

If you would like to print out the list or export the list to a CSV file, use the [Print List](#) or [Export List](#) button. This will print or export the entire contents of the list in the dialog, just as it is shown.

Once you have them filtered as needed, you can trim down the list further by selecting only those reservations to print. For instance, you may want to avoid printing confirmation letters for any that are arriving within the next few days. Use the multi-select methods to select multiple records (click / shift-click for a range, ctrl-click for individual lines). If none are selected, all will be printed (the same as selecting all records).

Once you have what you want to print selected, you will want to select the receipt format to print. As on the New Transactions dialog, this will default to the selection chosen in [File | Printing Options](#). You can select a different type here, and it will only affect this one printing (it will not change the default). See Receipt Types in the *Working with Transactions* section for details on the different types.

There are 4 options for selecting which transactions will be printed for each one:

[Print All Transactions](#) -- This prints all transactions for the reservation.

[Print "new" transactions](#) -- This will print all transactions added in the last Transaction dialog session. Thus you can use this to re-print the last "new" receipt.

[Print unpaid/unbalanced transactions](#) -- This will generally print any transactions since the last full payment was made. Technically it will find the last "zero-balance" point in the transactions and print any

after that point. Since the order of the transactions affects this, there may be cases where it doesn't correctly find what you would consider the last paid-in-full point (for instance if a new charge is added before they make a payment for previous charges, without paying for the new charge to zero the balance).

Print transactions starting this date -- This allows you to print transactions added since a given date (including those added on the given date). This is most useful to work around problems of payment order mentioned above, or if you need to print an invoice for multiple meter readings or other charges added in different sessions.

Finally, just click Print Receipts (or press **F8**) to print them.

Reservation Filtering Dialog

This dialog allows a number of filtering options to aid in printing mailing labels, envelopes, and batches of invoices or confirmation letters.

The first section is the date filtering. If selected, there are 5 different options for date filtering (only one can be used at a time). Start date filtering is handy for printing invoices for any that are arriving soon. End date filtering is useful for pre-printing check-out receipts for the day. Start-to-end filtering could be used to print an end-of-month receipt for all those present at that time, or to print mailing labels for any that will be present for your annual parade, or any who stayed at your park last year. Paid-through date filtering is useful for printing invoices for those who have not paid past a certain date. And finally, Date-made filtering is handy for printing invoices or letters for any reservations made today, yesterday, etc.

Next you can filter by the length of stay. You can specify a range of nights or just a minimum number of nights (by leaving the maximum set to 0). Note that this only includes actual nights stayed or reserved, not blocked nights.

The next section includes options to include or exclude groups, free sites, or extended-stay reservations, and to include or exclude any that have a balance or not. You can even select *only* credit balances to print, in case you need to send refunds.

Next, you can filter by the reservation status, the discount used on the reservation, and how they heard about your park. You can make single or multiple selections in each list as needed. (Selecting none in the list is the same as selecting all of them.)

Finally, you can use Site Filtering to select the individual sites, site types, site classes, and/or parks to include.

To clear all selections (for no filtering at all), click the Reset All button. You can click Cancel to abort changes, but this may not clear all selections (it will keep the selections that were present when you entered the filter dialog).

10 Import and Export Functions

Overview

Campground Master supports a number of functions for getting data to and from other programs. While most smaller campground owners will find that Campground Master does everything they need, it can be useful for accounting to export the transactions into QuickBooks, or export reports or raw data to a standard format to be processed by other programs. Reports like the On Site report and Meter Reading reports can even be exported to a Palm or Pocket PC to use as a walk-around checklist.

The Import function can be used to transfer customer and reservation data from another system into Campground Master, to avoid retyping everything.

If your campground has a web site, then you may find the Export to Web function useful for showing your web site visitors what vacancies you have. Of course this is only as useful as you make it by updating the web site often enough, but if you want to take reservations through the web it can be very helpful.

Importing Customer or Reservation Data

The Import function can be found on the main menu: [File](#) | [Import](#) | [Import Customer/Reservation data](#). You must have Administrator access to use this function.

IMPORTANT: Make sure you have a backup before doing the import, so you don't have to manually delete data if a mistake is made!

There are two requirements for the data to be imported:

1. It must be in either a comma-separated-value (CSV) or tab-delimited (text) format. If it's a CSV format, make sure that any fields with commas are enclosed in quotes (this is the standard).
2. The fields must be in a form that equates to the fields in Campground Master. For instance, the First and Last name of the customer must be separate fields, City/State/Zip must be separated, dates must be in mm/dd/yyyy format (or dd/mm/yyyy if outside the U.S.), and Site names (if importing reservations) must match either the Site Name or Abbreviation fields of the sites you've defined in Campground Master.

Importing Customers vs. Reservation

Keep in mind that customers and reservations are separate in Campground Master. Reservations are "linked" to customers, but the customer data is in a separate table. Reservations also include the site number and dates of the reservation.

You can import just the customer data from a customer list, or you can import the customers along with reservations at the same time if your import file contains the necessary information. You will see when defining the import fields (below) that there are two sets of fields -- one for Customers and one for Reservations. If you're importing just the customer data, then you will only select fields for customers. If the import data has sites & dates information, then you can also import the reservations by selecting the reservation fields. You must have a first night and last night for the reservation, and preferably a site for it also (otherwise they will all be "unassigned" and you will need to assign each one to the appropriate site manually). When importing reservations, it will first create a customer record (checking for duplicates), and then will create a reservation record for that customer. If your import data has multiple reservations for a single customer, that's fine -- it will create the customer only once, and will create multiple reservations for it.

Importing Customers from QuickBooks

You can import a customer database from QuickBooks accounting software using this same Import function. First you need to export the data from QuickBooks using its Export Addresses function: File -> Utilities -> Export Addresses. You may see a prompt for selecting the names to export, in which case you should select All Customers/jobs from the list (you don't need to vendors and employees, and probably don't need "other names"). Then click OK and enter a file name to export to, such as "Customers.txt". This will be a tab-delimited file that can be used for importing below, and will have appropriate address/city/state/zip information if you entered this data uniformly into QuickBooks.

The Import Process

There are several easy steps to importing.

- 1. Select a file.** You can enter the entire path to the import file, or use the Browse button. When browsing, it will look for .csv and .txt files by default, but you can change the file type to show all files if needed.
- 2. Select the file format.** Select either comma-separated or tab-delimited. Don't worry if you get it wrong -- the data will obviously look wrong when you import it if you choose wrong, and you can simply change this selection and do the Import again.
- 3. Load the file for preview.** Click the Load Import File button to read the data. The data is not actually added to your database yet, it's just loaded in the list on the dialog for previewing and editing.
- 4. Define fields to import.** If the file loaded successfully you should see the data in nice columns in the table. If the import file had headers in it, you'll even see the headers in the first line, like "first name", "last name", "city", etc. Now comes the important part -- you have to decide what each column means, in terms of Campground Master fields. This is usually pretty easy to do. Just right-click on each field (either the header or the actual data), select Customer field or Reservation field as appropriate, and then select the field that corresponds to that column. The column header will then change to that name so you know you've defined it. You don't have to assign fields to each column -- just skip any that you don't need or don't have corresponding fields. If you make a mistake, use the Remove function on the right-click menu. See the notes below for more details.
- 5. Select fields to use for duplicate-removal.** When the data is imported, duplicate customers will be automatically removed if possible. This not only applies to data you're importing, but also to any customers already in your database (it won't remove duplicates from your database, but it will avoid importing duplicates.) This requires at least a Last name and First name field (the data isn't much use without those anyway). You can also choose to check the Zip code field and/or the Address line 1 fields, to avoid filtering out common names like John Smith unless they live at the same place. If you uncheck these fields, or if they're not available in the imported data, then it will assume any that match first and last names are duplicates.
- 6. Convert names/addresses to mixed case or upper case.** Other programs may force or suggest that customer information be all upper case, which is easier to enter but is not as professional looking on receipts, and also takes up more room so less information can be shown on the Rack before it has to be truncated. So you may want to decide to start entering the information in mixed-case, and you can also have the import function convert the old information. Conversely, you can make sure that all of the old information is in upper case if you wish to keep with that procedure. Note that this only affects the data during this session, not data already entered or previously imported into Campground Master.

7. Edit data if needed. The preview list is fully editable, so you can delete any records that you don't want to import (like obvious duplicates or blank records), and you can even enter corrections as needed here before importing. Just click on a field to select it and start typing to replace it, or click twice to edit the value without replacing it. Likewise, just click any field on a row and click the Delete button to delete the record. (Ctrl-click for multiple selection also works.) Note that if the import file included a header row, you should also delete that row so you don't get a customer that's just a header.

8. Import the data. When everything looks right, click the **Import Data!** button to perform the import. You may see an error or warning prompt about duplicate filtering or field definitions if there seems to be something missing. As the data is imported, you will see customer/reservation totals and a duplicate total count up at the bottom.

When the import is complete, all records imported are removed from the list, but there may be some records left over in the list and a message saying that some errors were detected. These are typically records that don't have a last name (required by Campground Master), or for sites that weren't recognized (if importing reservations), or dates that were not formatted properly. You can ignore them and close the dialog, or you can manually edit the records and run the Import again, as many times as needed to get them all imported.

When all is finished, just Close the dialog -- the data is imported to the database and the reports will be refreshed if necessary.

Notes on Importing Reservations

Reservations are tricky to import because many of Campground Master's reservation data fields are unique, and the software must make certain assumptions. As mentioned above, the primary criteria is that the site names must match. If this isn't the case and you have a lot of reservations you would like to import, you might adjust the site names temporarily to match the data to be imported, and then change them back. (Using copy/paste to and from a spreadsheet like Excel can make it easy to change them back to what you want after importing the data.)

IMPORTANT: If you don't assign a field to be the site name, or if the site name for any reservations is empty, then the reservation will be made "unassigned" and you will have to assign the site yourself after import. If the reservation has a site name but it just doesn't match one in the database, it will not be imported and will be left in the list as an error.

The dates must also be formatted properly, and the imported data must contain at least a first and last date. It's also important that you know whether the "last" date is the "Last Night" the way Campground Master defines it, or if it's the "leaving" date (Last Night + 1). You can choose either Last Night or Last Night+1 for that import field accordingly. If there is "extra" data after the date (some programs export a timestamp after the date), that's fine -- anything after the first blank space ignored. The date order (mm/dd/yyyy or dd/mm/yyyy) will be assumed to follow your computer's international date settings -- for instance in Canada, the date is assumed to be dd/mm/yyyy. There is a little flexibility in the date format -- for instance, dashes can be used instead of slashes, and there doesn't need to be leading zeroes or centuries (e.g. 1/3/02 is fine).

Since reservation status cannot generally be imported (except in the case of ReserveRight), the program will assume that any reservation ending prior to today is checked out, and any reservation starting after today is pending. Any that cross today will be checked in automatically. Of course none of these will have transactions, so transactions will have to be added manually if needed. The "operator" field for check-ins and check-outs will be set to "(imported)", and the date/times for the operations will be set to reasonable values (the check-in date will be the actual start date, check-out date will be the end date). If a confirmation number is not imported for a reservation, then one will be generated for it.

If the imported file contains multiple reservations for the same customer, then duplicate customers will be "merged" properly and the reservations will be applied to a single customer (according to the duplicate-

filtering rules mentioned above). Likewise, if the customer already exists in the database, the reservations will be added to that existing customer.

Some fields can be selected more than once, and the data will be combined into the one field in Campground Master. For instance, any data that doesn't have a direct import correlation can be imported to the Reservation or Customer Notes field. Each imported field will be added to a new line in the Notes. Likewise you can combine license number & state fields into the single license field in Campground Master, or add multiple First Name fields together.

IMPORTANT: No conflict-checking is done when importing reservations! If you already have reservations entered that conflict with imported ones, or if the imported data contains conflicting reservations, you will have to sort these out manually after importing.

Hopefully everything will go well and you'll have all of the necessary details to get started. Of course a lot of the things normally entered in Campground master won't be there for the imported reservations, like how-
heard, extended-stay and group flags, etc., but the essentials will be there to get you started.

Exporting Reports and Data to Other Programs

Any of the Tab View reports, as well as almost any report grid in a dialog such as Find Customer, can be exported. You can also export any of the raw data tables found in the [Maintenance | Raw Data Tables](#) functions.

There are two ways to get the data in another program -- through Copy/Paste, or with the Export to CSV function.

Copy/Paste

To copy data directly to another program such as Excel, just highlight the desired cells on any grid report (or press **Ctrl-A** to select all cells), then **Ctrl-Insert** or **Ctrl-C** to copy to the clipboard. Then switch to the other application and paste the data. The data is copied in Tab-delimited format, so it can be pasted into nearly any program that supports Tab-delimited data or text. However, only the data cells can be copied this way, not the header row and column. To get the entire report into another program, use the [Export to CSV function](#).

Exporting to Tab-Delimited Format

As mentioned above, when data is copied from a grid it's already in tab-delimited format. Thus you can create a tab-delimited export file by using the copy function above, then open Notepad or any text editor, and paste the data into it. Then save the file as a ".txt" file. However, as mentioned above, this will not contain the header rows or columns. To get the headers you must use the CSV export function below.

Exporting to CSV Format

"CSV" is a common file format, which stands for "Comma Separated Values". You can export any of the grid reports to a CSV file which can be loaded into a spreadsheet like Excel, or loading into a PDA like a Palm or Pocket PC. When a report is exported to a CSV file, it will contain all of the data and also the headers, just as shown in the current view or dialog grid.

To begin the export, either use the [Export Current View](#) option on the [File](#) menu (this is used for any tab view report), or click the [Export List](#) button on any of the other dialogs that have a grid-type report. Alternatively you can press **Ctrl-F10**, which will work for any of the supported reports.

Next you will see the standard file dialog. Just enter the filename and select the location (navigate to the desired folder) and click [Save](#). The file will have the extension ".csv" so it's recognized by other software as a CSV file.

To get the data into your other software, you'll need to locate the appropriate function. This is usually an "Import" function under a "File" menu, but programs can vary.

If you want to load the exported data into a Palm PDA, you will need to use a 3rd-party program that can read CSV files. Many such programs are available. We recommend a popular program called MiniCalc, which sells for around \$30.

Technical notes: To ensure that data with commas is imported properly, all fields are enclosed in quotes. Most CSV import functions will remove the quotes properly. Also, if the data itself includes quotes (the double-quote character (")), these will be automatically converted to single-quotes in the CSV file. While this isn't strictly the standard, it helps some programs cope with the data better.

Exporting Transactions to QuickBooks

Overview

This feature allows you to export the Campground Master transaction data to a file that QuickBooks can import (IIF format). Transactions can be exported as often as daily (daily totals are exported), or it can be done once a week, once a month, or however often you need the data in QuickBooks.

All of the charges will be transferred by transaction category, and all of the receipts will be transferred by payment method. The daily totals can be exported to QuickBooks either as General Journal entries for each category and payment method or as a single Cash Sale transaction with line items breaking out the category details.

If you have accounts receivable (e.g. you add charges to reservations before payments are received, such as monthly rent), you can have the A/R balance go into an Accounts Receivable account in QuickBooks. If you take advance deposits, they can also be assigned to a separate QuickBooks deposits account until they're applied, to track deposits as a "liability" against the actual receipts.

Using the QuickBooks Export Function

To begin the export process, open the Export dialog from [File | Export | Export Transactions to QuickBooks](#). This dialog contains all of the setup and options needed for exporting. Generally you only need to do the setup and set the options the first time, and thereafter you only need to verify the date range and click the button to do the export.

Note that if you already use QuickBooks, you may want to base your Pick List setup for Transaction Categories and Payment Methods according to your QuickBooks accounts, to make the transactions in Campground Master map easily to your existing accounting system.

Setup

Although you need to do this first before exporting, it's at the bottom of the dialog because you only need to do it once (unless you change configurations in Campground Master or QuickBooks, requiring different account mapping).

Import accounts...

Before you do of the Setup selections, you should use QuickBooks to export some lists that Campground Master can use to make mapping easy. (You can skip this and type all account names manually, but besides being error-prone that would take forever!)

In QuickBooks, select from the menu: File -> Utilities -> Export... an Export dialog will open where you select the lists to be exported. Export the following lists:

- Chart of Accounts
- Customer List
- Vendor List
- Item List

Click OK, then select a location for the export (IIF) file, and enter a name for it. Click Save, and when it confirms that the export is complete you can return to Campground Master.

Now you can import the lists from QuickBooks. This is done inside the Export to QuickBooks dialog -- it's not a separate import function in the Campground Master menus since it's only temporary, for setting up the QuickBooks mappings. You will need to import these again each time you need to use these setup functions (but you don't need to do the export from QuickBooks again unless the accounts change there). Click the button "Import accounts, etc. from QuickBooks" (in the Setup section of the dialog), and navigate to the file you just exported from QuickBooks. Open that file, and the lists should be imported almost instantly. You can tell if they imported correctly by dropping down one of the lists in the Setup area -- if it's not empty, then the lists were imported.

Export Method

Before setting up the mappings, you should decide whether you're going to be using the General Journal export method or the Cash Sale export method, since some setup parameters will be affected by this. While you can change this at any time, it's a good idea to choose one method and stick with it, for consistency.

The General Journal entries method will create a pair of journal entries for each transaction category (for charges) and each payment method (for receipts), in addition to entries for deposits if applicable. All entries go through Accounts Receivable -- that is, every charge entry is treated like an A/R amount, and every payment entry is a payment against A/R. The net difference is essentially the change in your A/R balance for the day, and will be reflected in the QuickBooks A/R balance accordingly.

This is the "simplest" method in terms of a straight transfer of transactions, and is a good method to use if your Transaction Categories map directly to QuickBooks "Income" accounts. However, journal entries don't allow QuickBooks "Item" info from the mappings to be used, so if you use Items in QuickBooks for your different categories of sales, then the Cash Sale method will be a better choice.

The Cash Sale method will create a single Cash Sale in QuickBooks for each day (or you can combine all days into one). This is just like creating a Sales Receipt for a customer. The charges will be added as Items sold, using the Items mapped to transaction categories, and receipts will be added as negative entries on the sales receipt, itemized by payment method. If you're using auto-taxes for any of the accounts in QuickBooks, it will also include the applicable tax entry.

Deposits, Deposits Applied and an A/R balance adjustment will also be added as entries in a manner to make

the total value for the sale balance out to zero. (This is because QuickBooks cannot handle a negative sale, which could happen on occasion if things don't balance.) Optionally, you can leave out mappings for some of the Receipt payment methods such as Cash, Checks, and Traveller's Checks. In this case, the balance should be the total receipts for these, and thus you can use "Undeposited Funds" as the account for the Cash Sale to have these receipts automatically go into undeposited funds. (You would get the same result by mapping them to Undeposited Funds and letting the cash sale balance out to zero, except that would result in multiple entries to undeposited funds instead of just one.)

One advantage of the Cash Sale method is that you can easily see daily activity snapshots in QuickBooks, by browsing the Cash Sale receipts. However this may just not make "sense" for your accounting methods, in which case the Journal entries can be used.

Note that Misc. Income and Expense transaction types are always exported as individual Journal entries, even if you use Cash Sale for the export method. This is because they are not the customer charge/payment transactions, and should be transferred individually just as they were entered. Actually, if you use QuickBooks for your accounting then you should probably *not* be using Campground Master for Expense transactions or Misc. Income -- those would be better suited for direct entry into QuickBooks, which can record more detailed information about them.

Customer:

Select a QuickBooks Customer to use. This is particularly important for the Cash Sale export method, but is also required for the A/R entries when using the General Journal export method. Generally this is just a dummy customer created in QuickBooks like "Daily Sales". If the customer has address information, that will appear on the sales receipt in QuickBooks.

Account for Accounts Receivable balance:

Select an account to use for Accounts Receivable. This is required to be "Accounts Receivable" when using the General Journal export method. If using the Cash Sale method, it can be any account you want to use for any "balance" for the sale. This should still be "Accounts Receivable" if you every carry an A/R balance (i.e. if the charges don't balance with receipts for the day).

Account for Deposit Balance (optional):

If you accept advance deposits, you should track those separately from other payments (usually as an "Other Current Liability" account in QuickBooks). Select the account for your deposits balance here. Campground Master will keep it p to date by adding any new Deposits and subtracting any Deposits Applied.

Account for Cash Sales:

If you're using the Cash Sale export method, you need to select an account to receive any remaining balance. If you map everything properly, there really shouldn't be any balance, but an account is still required. You can use Undeposited Funds (as mentioned earlier), or create an "Unknown balance" account to catch any unexpected imbalance, or use some other asset account (some accounts may not be allowed by QuickBooks).

Mappings

Now for the tedious part -- you need to map every Transaction Category (almost) and Payment Method (twice) to an appropriate QuickBooks "Account" or "Item". Details are found in the sections that follow, but here's a checklist:

- Transaction Categories Mapping
- Receipt Payment Methods Mapping
- Expense Payment Methods Mapping
- Taxes Mapping for Auto-taxes (Cash Sale method only). Note that to use auto-taxes, you also need to check the "Handle taxes separately from charges" box below the Taxes mapping button.

Preparing to Export

Now that everything is set up (and should be saved so you only need to do it once), you just need to select the dates to export, whether to combine the dates or not, and the location of the file. Although the file name and all/single options are saved each time, these should be double-checked every time you export just to be sure.

The dates will default to just today. This works well if you export at the end of every day, but that probably won't always be the case. Just change the dates for the range of transactions you need to export. Keep in mind that these are really transaction dates, but reservation dates.

If you choose to Export all as a single date, the transactions will be totalled only once for the entire date range, and only one set of transactions will be exported. If you don't care about daily reporting and just want to minimize the number of entries each month, then this may be what you want to do.

If you choose to Export each day individually, then the transactions will be totalled separately for each date in the range. The results will be exported either as a Cash Sale for each date, or a complete set of Journal entries for each date. This gives you maximum detail in QuickBooks, but can result in long reports.

Note that Misc. Income and Expense transaction types are always exported as individual Journal entries, regardless of the choice here.

The File path should be the complete path and filename of the file to be exported. (Whether you export each day individually or all as a single date, it still only generates one file containing all of the transactions.) You can use the Browse button to locate a suitable folder and enter a file name. The file will be a QuickBooks "IIF" file (Import Information File), with an extension of ".iif". Generally you can re-use the same file name every time you export, if you're going to be importing it to QuickBooks immediately afterwards. If you ever needed to re-generate an import file for a given date, you can simply change the dates on the dialog and export a new file.

Exporting the Data

Finally, just click the Export! button to create the export file. It should only take a few seconds, and will report success.

You may also see a warning if there are any charges that weren't mapped to QuickBooks accounts -- this usually indicates that some transaction categories or payment methods were missed, so you need to go back to Setup and check the mappings. Additional or changed transaction categories could also cause this.

When using the Cash Sale export method, note that if there are no transactions for a given day, then no Cash Sale will be exported for that day.

Importing the File to QuickBooks

Once the transactions are exported, open your QuickBooks database and select from the menu: File -> Utilities -> Import... an Import file dialog will open. Just select the file created above and click Open, and the data will be imported. For Cash Sales, you can review the imported data by going to Customers -> Enter Sales Receipts (you may need to use the Previous/Next buttons to locate the correct date.) To review journal entries, go to Reports -> Accountant & Taxes -> Journal, or select the Accounts Receivable account from Lists -> Chart of Accounts.

Transaction Categories Mapping

This dialog is used to map each of Campground Master's Transaction Categories to a QuickBooks Inventory Item and/or Account. These mappings will be used when exporting Charge, Discount, Credit, and possibly Tax transactions as sales totals. It will also be use for the Misc. Income and Expense transaction Journal entries (note that these will not use the Inventory Items, only the Accounts).

Assuming you used the Import accounts from QuickBooks function first, this may be as simple as picking from lists. If you didn't import the items/accounts from QuickBooks, you can still enter the account names manually, but that is very error-prone.

The process is simple:

1. Select a transaction category to map from the left-hand list
- 2a. If this will map to an inventory item in QuickBooks, select that item from the QuickBooks Inventory Item drop-down list. The Account and Description will fill in automatically for that item. You can leave the description or edit it as needed, but don't change the Account, since this has already been assigned to that item in QuickBooks.
- 2b. Or, if you're not mapping to an inventory item, select a QuickBooks Account from the next drop-down list, and then enter a Description.
3. If this is an auto-tax item in QuickBooks, check the Taxable? box. This is important only if using the Cash Sale export method, but it must be done properly to avoid errors when importing to QuickBooks. If you're not sure, refer to your QuickBooks account list to see if this item/account is taxable. (If any of the items are set up to auto-tax in QuickBooks, you will also need to set up Taxes Mapping separately.)
4. Click Add Mapping. The details of the mapped category will appear in the bottom list, and the category will be removed from the first list so you know it's mapped already.
5. Repeat for all categories, then click Save. All of the mappings will be saved and used each time you use the Export function.

Mapping Notes

If you are using auto-tax in QuickBooks for any of the inventory items/accounts then you will need to map the corresponding tax category separately, and **don't** map them here for charges. (If you receive a tax-item error when importing to QuickBooks, you will need to map the taxes separately.)

All Transaction Categories defined in Campground Master will be shown in the category list, even if they aren't normally used for charges. Thus you don't need to map the categories "Deposit", "Payment", etc. If you do want to just clear out the list so you know you're done, you can map them to dummy accounts (no transactions will be exported for them anyway).

You can map multiple categories to the same item/account in QuickBooks if needed. They will generate separate entries to the same item/account.

If you need to change a mapping, select it from the bottom list and click Delete. It will be removed from the bottom list, but it will also be selected automatically in the category/item/account lists, so all you have to do is make any changes and click Add Mapping again.

Receipt Payment Methods Mapping

This dialog is used to map each of Campground Master's Payment Methods to a QuickBooks Inventory Item and/or Account, for any receipts (or misc. income) transactions. These mappings will be used when exporting Payment, Refund, and Deposit transactions as sales totals. It will also be use for the Misc. Income transaction Journal entries (note that these will not use the Inventory Items, only the Accounts).

Assuming you used the [Import accounts from QuickBooks](#) function first, this may be as simple as picking from lists. If you didn't import the items/accounts from QuickBooks, you can still enter the account names manually, but that is very error-prone.

The process is simple:

1. Select a payment method to map from the left-hand list
- 2a. If this will map to an inventory item in QuickBooks, select that item form the [QuickBooks Inventory Item](#) drop-down list. The Account and Description will fill in automatically for that item. You can leave the description or edit it as needed, but don't change the Account, since this has already been assigned to that item in QuickBooks.
- 2b. Or, if you're not mapping to an inventory item, select a [QuickBooks Account](#) from the next drop-down list, and then enter a [Description](#).
3. Click [Add Mapping](#). The details of the mapped payment method will appear in the bottom list, and it will be removed from the first list so you know it's mapped already.
5. Repeat for all payment methods, then click [Save](#). All of the mappings will be saved and used each time you use the Export function.

Mapping Notes

If you're using the Cash Sale export method, you can opt to leave some of the methods unmapped and let those receipts be the balance of the cash sale. This would typically be the ones like Cash and Check, and the your "Account for Cash Sale" (on the previous dialog) would be "Undeposited Funds". However we recommend against this because it could result in a negative balance (e.g. you have a large cash refund to someone), which cannot be imported to QuickBooks. It's best to map all payment methods.

You can map multiple payment methods to the same item/account in QuickBooks if needed. They will generate separate entries to the same item/account.

If you need to change a mapping, select it from the bottom list and click Delete. It will be removed from the bottom list, but it will also be selected automatically in the lists above, so all you have to do is make any changes and click Add Mapping again.

Expense Payment Methods Mapping

This dialog is used to map each of Campground Master's Payment Methods to a QuickBooks Account, specifically for Expense transaction Journal entries. If you never enter Expense transactions in Campground Master, these mappings aren't needed.

Assuming you used the Import accounts from QuickBooks function first, this may be as simple as picking from lists. If you didn't import the accounts from QuickBooks, you can still enter the account names manually, but that is very error-prone.

Remember that you're mapping payment methods for expenses here, so this is money going out, not money received. Thus a credit card payment method should be mapped to a credit card account, not the merchant/bank account that receives your credit card sales.

The process is simple:

1. Select a payment method to map from the left-hand list
2. Select a QuickBooks Account from the drop-down list, and then enter a Description.
3. Click Add Mapping. The details of the mapped payment method will appear in the bottom list, and it will be removed from the first list so you know it's mapped already.
5. Repeat for all payment methods that you might use for Expense transactions, then click Save. All of the mappings will be saved and used each time you use the Export function.

Mapping Notes

You don't need to map all payment types, only the ones that you might use when paying for expenses.

You can map multiple payment methods to the same item/account in QuickBooks if needed. They will generate separate entries to the same item/account.

If you need to change a mapping, select it from the bottom list and click Delete. It will be removed from the bottom list, but it will also be selected automatically in the lists above, so all you have to do is make any changes and click Add Mapping again.

Taxes Mapping for Auto-taxes

This dialog is used to map each of Campground Master's Transaction Categories for Taxes to a QuickBooks Inventory Item and/or Account. These mappings are used for exporting Tax transactions for auto-tax entries. This may only need to be done if you're using the Cash Sale method and you have auto-tax items set up in QuickBooks. Otherwise, tax categories should be mapped along with the Transaction Category Mapping for other charges. However if you receive an error message related to tax items being blank, then you need to use tax mappings, and map them as auto-tax rates.

Assuming you used the Import accounts from QuickBooks function first, this may be as simple as picking from lists. If you didn't import the items/accounts from QuickBooks, you can still enter the account names manually, but that is very error-prone.

The process is simple:

1. Select a tax category to map from the left-hand list (only categories that you have set up in Taxes Setup will be shown.) Note that the Tax Rate will be automatically filled in as defined in Taxes Setup. The Tax Rate field is just for reference, and isn't actually used for calculations in QuickBooks. Don't change it.
- 2a. If this will map to an inventory item in QuickBooks, select that item from the QuickBooks Inventory Item drop-down list. The Account and Description will fill in automatically for that item. You can leave the description or edit it as needed, but don't change the Account, since this has already been assigned to that item in QuickBooks.
- 2b. Or, if you're not mapping to an inventory item, select a QuickBooks Account from the next drop-down list.
3. Select a Vendor from the drop-down list. This required for taxes, and should be the vendor you have set up as the tax commission or state comptroller (where you pay your sales taxes, for instance).
4. Enter a Description if necessary.
5. If this is an auto-tax item in QuickBooks, check the Is this an auto-tax rate? box. (Since you should only be doing this for auto-taxes, this should always be checked.)
6. Click Add Mapping. The details of the mapped category will appear in the bottom list, and the category will be removed from the first list so you know it's mapped already.
7. Repeat for all tax categories, then click Save. All of the mappings will be saved and used each time you use the Export function.

Mapping Notes

Any of the tax categories you map here should **not** be mapped in Transaction Categories Mapping.

You can map multiple categories to the same item/account in QuickBooks if needed. They will generate separate entries to the same item/account.

If you need to change a mapping, select it from the bottom list and click Delete. It will be removed from the bottom list, but it will also be selected automatically in the category/item/account lists, so all you have to do is make any changes and click Add Mapping again.

Exporting to Web Vacancy Grids

This feature allows you to show vacancy status on your web site, essentially like a compressed Rack view with no customer details. The pages can also have active links in each vacant cell on the grid which make a reservation request for that site on that day.

The program will generate the web pages to your specifications, and then you will need to upload them to your web site. While uploading is not automatic, there are a number of programs available that can make this a simple point-and-click operation after generating the pages (see below for some recommendations). Therefore you could easily upload the changes several times per day as needed. The pages can also be time-stamped so the web site visitor knows how recent the page was updated.

One or more sets of 12 pages will be generated, one for each month for the next 1 months (the current month will be partial, starting with the current day). You can select what sites are shown on each set of pages -- show all sites in one set, or make a separate set for each Site Type or Site Class. If you have multiple Parks set up, also have the option to generate a separate set for each Park.

Selecting Sites

To select which sites to include on the pages, use the Select Sites to Include button. This will open the familiar Site Filtering dialog, where you can select the sites to include by individual site or by Type, Class, and Park.

Next you can choose whether to show all (selected) sites on one page, or separate the pages by type, class, or park. Of course this will depend on how you want to present them on your web site -- your web site will have to include a link to the first page of each set. Only one link is needed if it's all in one set, while many separate links will be needed if you show a different site type or class on each page. Note that you only need to link to the first page in a set (the current month) -- the generated grid will already contain links to the other months.

Template File(s)

The web pages will be generated using templates of your own design, so you can match your web page's style. The templates are basically HTML web page files with two insertion markers in the page:

```
###VACANCYGRID###
```

This must appear exactly as shown somewhere in the template file. The HTML code for the entire vacancy grid will be inserted here, replacing the marker. (Don't put it inside a comment tag, or else the entire grid could be commented out!)

```
###ASOFDATE###
```

This marker is optional, and will be replaced by the current time and date. This is just for the visitors' reference, so they know how recently the grid was updated. This could be placed at the bottom of the page below the grid.

Template File Path

Enter the path containing the template files, or use Browse to locate them. Browse will open a File-Open dialog for the file type ".htt" and a dummy name for the file -- just navigate until you find the folder with the templates and click Open.

The file or files must be named a certain way:

If showing all sites on one page, the template must be named "All.htt".

If showing separate pages by type, class, or park, you must have one template file for each type, class or park. This allows you to have different formats or links on each set of pages, accordingly. The template must have the type/class/park name, followed by ".htt". If the name contains spaces, replace the spaced with dashes (minus signs). For instance, for the site type "Normal RV", the template would be "normal-rv.htt". It doesn't matter if the letters are upper-case or lower-case.

An example "All.htt" file has been installed to your Campground Master folder.

Output File Path

Enter the path for the generated web page files. This can be the same as the template path or different.

When the files are generated, the template names will be converted to lower case, have ".html" as the extension, and will be prefixed by "vacancyMM", where MM is the month offset (00 for the current month, 01 for the next month, etc.). For instance, "vacancy00all.html" for all sites on one page, or "vacancy00normal-rv.html" for the Normal RV site type.

Formatting

You can use the Repeat dates setting to adjust how often a new set of date column headers appears in the grid. We recommend every 20 rows, so that when the visitors scroll the page they will always be able to see the headers, even if they have a low-resolution monitor. You can change this value to fit your tastes. or blank it out to avoid repeating the column headers at all (except the top and bottom, which will always have them).

The font face and size for the grid can be entered to match your web site. Keep in mind that these are the literal strings that will be used in the tags in the HTML page. The font face will be enclosed in quotes (so you don't need to enter quotes).

You also have complete control over the colors used in the grid. Use the Define Grid Colors button, which opens up a Color Key dialog for defining the colors. Note that some color definitions only affect the foreground or background color -- these are indicated with comments like "BG ignored" and "FG ignored". Some colors can be defined separately for Mon-Fri cells and Sat-Sun cells, so weekends can be seen easily.

Finally, each vacant site in the grid can have a text designator in it for Vacant, Reserved or Unavailable, and the "V" (vacant) cells can optionally be linked to a script on your site, or set up to generate a simple E-mail request for a reservation. You can define the link format to anything you want -- it will be enclosed in a hyperlink tag like .

The default link format can be used to send an E-mail to you with the details of the request. (Note that the E-mail field from the Park Setup will be inserted the first time you open this dialog. If the Park E-mail has not yet been set up at that time, you may need to insert it yourself). In case the default link is overwritten, here is the default:

```
mailto:(your park E-mail here)?subject=Reservation request for site <site>, arriving on <date>
```

Note that the link can have <site> and <date> markers in it, which will be replaced automatically with the site and date for the corresponding cell. If you have an existing reservation-request form on your site, your webmaster may be able to set up a cgi-script which can be used in place of this E-mail link that will automatically jump to the form and insert the site and date information.

Finishing the Export

When everything is set the way you want it, click the [Export Web Pages](#) button. The pages will be generated and you will see either a "success" message or an error message, if something didn't work (e.g. a template file was missing). The dialog will then close if there were no errors.

All of the settings will be saved, so the next time you want to generate the pages, you only need to click the Export Web Pages button.

After exporting, you still need to upload the pages to your web site (unless you host it yourself). There are many good FTP programs available to assist in uploading. Most of them can be set up to do the upload in just a few clicks of the mouse. Here are some you may want to try if you don't already have something suitable:

WS_FTP, by Ipswitch: <http://www.ipswitch.com/>

FTP Voyager, by RhinoSoft: <http://www.RhinoSoft.com/>

Macro Scheduler, by mjtnet: <http://www.mjtnet.com/>

1ClickFTP, by CyberTech: <http://www.1clickftp.com/>

11 Maintenance Functions

Overview

Maintenance functions, available in the Maintenance menu of the main menu, are functions that are typically used only occasionally to setup up the database or make certain "dangerous" changes to the database. None of the maintenance functions may be accessed by an operator with less than a Manager access level, and only the Backup and Restore functions can be used by a Manager -- the rest of the functions require Administrator access.

Back Up and Restore Database

The reasons to make backups are covered earlier in the section *Setting Up Your Campground Database*, so it's assumed that you will be doing this on a regular (daily) basis. Your data is too valuable to lose, so don't skimp on this step! Making a backup is very simple. In fact, after the first backup is made, it can be done with 2 or 3 mouse clicks.

A backup of the database is simply an extra copy of the database file, which can be used to restore all of your data either on the original computer or on another computer with the Campground Master software installed. The copy may be compressed to save space with the ZIP option (turned on by default). Normally backups are made to a floppy disk since any computer can read the disk, and they are small, cheap, and easy to use. If you have a more sophisticated computer setup, you might make backups to other kinds of removable storage or to another computer on the network. (We recommend using removable storage, since backing up to another computer does not allow for easy rotation of daily backups or for keeping a portable copy off-site.)

Backing Up

Before making your first backup, you need to decide where you're going to back up your files. Some advanced options were mentioned above, but for this discussion we will assume that you will back up to a floppy disk, which is normally your **A:** drive.

After inserting a floppy disk in the drive, just click on the "Safe" icon on the toolbar to start. You will see a "Save As" dialog, which is the standard Windows file dialog for saving files to a specific location. From there you need to do two things -- enter a file name and select a location for the file.

The first part will actually be done for you in most cases. You should see the name of your database in the File name field, possibly with a **.zip** extension instead of the normal **.prk** extension. If you don't see anything in the File name field, or if you prefer to name your backups differently (for instance you could use a different name for each day), then you can change that name. You should either leave the extension the same, or enter a name with no file extension (in which case it will use the default extension of **.zip** or **.prk**). Whatever name you use here, it will be remembered and used the next time you make a backup.

Now you need to select a location. If you have backed up before, the previous location is already selected for you. If this is the first time, you will need to select it from the Save In: drop-down list (called Look In: on some computers). Assuming you want to save it to the **A:** floppy disk drive, this may be as simple as clicking on the list to open it and clicking on the A: drive selection. If you don't see A:, click on My Computer to open up that folder, then click on the same drop-down list again to select A:.. If you haven't inserted a disk in A: you will get an error message, in which case you can insert a disk now and retry.

Now that you have a file name and location selected, click the Save button on the dialog (or OK on some systems). If there's a previous backup on that drive, it will show a warning that there is already a file by that name on the disk, and ask if you want to replace it. Answer Yes to proceed with the backup.

While the file is being backed up, the cursor will change to an hourglass (wait cursor). You can't do any other functions while the file is being backed up. Initially it should only take a few seconds. As the database grows, it will take a little longer to back up.

That's it, you've created a backup! Now the next time you back up, it can be done in 2 or 3 clicks -- click on the Safe icon, click Save (since the location and file name will be recalled from the first time), and click Yes if it asks you to confirm replacing the file.

Backup errors and handling large files

If you get an error message saying that the disk is full, you will need to start using the Compressed option so that it takes less space **and** so that multiple disks can be used if necessary. (Also make sure you are using disks that don't have any other files on them!) This is the default option, so you should never encounter a "disk full" message unless you change the compression option.

If the database grows too large to fit on one disk when you are using the Compressed option, you will be asked to "Insert disk 2 of the set" and so forth until the backup is complete. If you're using multiple disks, make sure you have each one labeled according to disk number (disk 1 of 2, disk 2 of 2, etc.) and that you have enough disks in rotation to make a set each day. For instance, you should have a "Monday 1 of 2", "Monday 2 of 2", "Tuesday 1 of 2", and so forth. Be sure to insert the correct disk of the set each time. When you need to restore the backup, you will be asked to insert the disks by number, so the order is important.

If you get an error that the disk is write-protected, try moving the little write-protect tab in the upper corner of the disk so that it covers the hole. If that doesn't work, it may be a defective disk or a defective disk drive. Try another disk, and if that doesn't work, consult a technician.

If you get other errors, like "error writing to A:", it may be caused by a defective disk. Try another one, and discard the one that had the error if another disk works. If each disk you try gets an error, then the drive could be malfunctioning.

Restoring from a Backup

We all hope it never happens, but the day may come when your computer malfunctions or some other problem requires you to restore the database from the backup copy. Hopefully you had been making daily backups so you won't lose more than a day's work. (This is also a good reason to keep copies of printed receipts for at least a day or two, in case you need to re-enter reservations.) This function can also be used to load the database that was backed up from another computer.

Restoring from a backup is just as easy as making a backup, but there are more steps and warnings because it's inherently a risky function. Even with a perfect backup, you are asking the software to load a database that may be older than the one it's currently using, so you need to be sure that it's necessary.

To start a Restore, select Restore from Backup on the Maintenance menu. Remember that you must have Manager access to use this function. After one or more warnings (depending on whether the current database is saved and whether you've done a backup from this computer), you will see a File Open dialog.

If you have done backups from this computer, it will assume you want to restore the last backup made and will fill in the file name and location accordingly -- so all you would have to do is click the Open button. If this is a new computer and you have not made a backup on it before, then you will have to navigate to the

location of the backup file (as in Backing Up above), and select the backup file name from the file list. This may be the A: drive (locate it with the "Look In:" drop-down list), or in some other location.

Once the File name field has the proper name in it, you can click Open. Now it will load the backup from the disk (asking for other disks in the backup set if necessary). Once that is done, you will get a "*** **Last Chance** ***" warning message. This indicates that although the backup data has been loaded, the original database file has not been replaced so you still have a chance to change your mind.

If you are sure that the database you just loaded from the backup is the data you want, then you can continue as normal (you will need to log in again, since the restoration procedure automatically logs out the previous operator). If you're not sure yet, read the following section carefully.

Aborting a Restore Operation

Assuming you have just completed the Restore and done nothing else, you still have a chance to change your mind and get the previous database back. This is because the database restored from the backup has not yet been saved to the hard disk.

If you immediately recognize that you don't want the restored data, then go straight to File | Open in the main menu, and make **sure** you say **No** to the "Save current database changes before opening a new one" prompt. Then select the original database file name from the Open dialog presented (the correct folder location should be automatically selected, but you will need to select the correct file name from the list).

If you need to look around at the data before deciding to keep the restored data, it gets more complicated. First you will have to log back in to look around. If you have the Auto-save function enabled, you really must be careful at this point, because any change to the database will cause it to be saved, replacing the original database. In fact, this may be the only time you ever see the blue disk "Save" icon enabled on the toolbar. This means that a change has been made (restoring the database caused the "change") but it has not been saved. Normally, with auto-save enabled, this state never exists because all changes are saved immediately. But restoring from a backup is the one case where the auto-save is disabled, but **only** until the next change is made! The safest thing would be to immediately go to Maintenance | Program Options | Database and turn off the Auto-save option. Then the old database won't be overwritten until you manually save the data.

If you're comfortable with file saving and loading, you might also want to use Save As to save the restored database to a different name, so you could use it as you like and still get back to the original if needed. (Once you're sure it's correct, you would want to use Save As to save it back to the original database name so things are back to normal.) If you're not comfortable with this, **don't attempt it!**

So now you have logged in, the data has not been saved, and you need to look around. If you don't turn off auto-save, treat it like a ticking bomb -- one click on Yes, Done, Save, or OK on a dialog can cause the data to be saved (even a Cancel could cause the data to be saved in some cases). However, you can look at each of the tab views to determine if the data is correct. Doing anything that would open a dialog, like Reservation Details, is potentially dangerous if auto-save is still enabled, but not a problem if you've disabled auto-save.

When you're satisfied that the restored data is what you want, click on the Save icon (the blue disk) or use File | Save from the menu, and then turn auto-save back on if desired.

If, however, you decide that this is not the database you want, then go to File | Open in the main menu, and make **sure** you say **No** to the "Save current database changes before opening a new one" prompt. Then select the original database file name from the Open dialog presented (the correct folder location should be automatically selected, but you will need to select the correct file name from the list). Then you can repeat the Restore process with another backup set if needed, or continue with the original data.

Park Setup Functions

Overview

The functions under Park Setup are for editing the Park, Site, Taxes, Rates and Operator tables of the database, plus a few other things. These are primarily used when setting up the database, but of course you can use them to make changes to the sites, edit the park notes for the receipt, add or change operators, and so forth. Administrator access is required to view Operators, and also to add or delete parks and sites. You can view and edit parks and sites with Manager access, but cannot add or delete them unless you have Administrator access.

The Park, Site, and Operator dialogs works the same as the Customer Details dialog. They have navigation controls at the top to step through records, add a new record, delete a record, and print a record. See the Customer Details dialog for information on the common navigation controls, and the appropriate section below for specific details.

The other dialogs (Taxes, Rates, Notice, and Confirmation text) are unique in their operation -- see the appropriate section below for details.

Parks Setup

Usually you will have only one Park record. This is used for the park info on the receipts and a couple other things. This is also where your software license authorization code is stored, which is keyed to the park information.

The only reason to have more than one park record would be to show different information on receipts for different sites -- for instance, you might want to print different Additional Notes on the receipts for your RV sites than for your cabins or tent sites. Your software license authorization code will limit the number of parks you can have, so be sure you request this when you purchase the software, or else you will have to request a new license code to add additional park records.

The individual park fields are described below.

Park Name, Address, Phone Number, Email, etc.

The only critical information of these is the Park Name and address, which is used for authorization. In addition, the Park Name is used in the Sites setup for selecting a park record for the site.

This information is also used for the printed reservation and transaction receipts. The Park Name, address, all three of the phone numbers, E-mail, Web and Owners information will all be printed on the receipts in the park information box.

The Short Name is not currently used, but in future versions could be used for an abbreviation in reports.

Check In and Check Out Times

The Check In time is used as the default Estimated Arrival time on the Reservation Details dialog. Also, these times will be shown on reservation receipts for the customer's reference. If you don't want to show these on the receipt, then you need to disable these fields under Maintenance | Data Field Definitions | Park Fields.

Key Code

This is calculated by the software, and it can't be edited. It's your park key, which you may need to provide to Cottonwood Software when purchasing a license, before you can get an Authorization Code. (If you make changes to the park name or address, you may see the key code changing.) It's important that you do not make any changes that would alter this without contacting Cottonwood Software for a new Authorization Code.

Auth Code

This is your Authorization code for your software license. **Keep this code written down in a safe place!**

Without the proper code here, the software will be limited to either a number of days use or will not allow you to add sites to the database. This code will be created by Cottonwood Software, based on your Key Code and the license details (number of parks, sites, workstations, and product options you need). If you change this code manually, the program will check that it's a valid code and may report an error. If the code is not valid, the software will revert to Demo mode, which is limited to 100 reservations. This code should only be entered the same time you enter the initial park name and address, so that it will be a valid code.

During your setup period or if you request a full-function trial, you may be given a "trial period" code, which will let you use the software for 30 days. Once you purchase the full license, you will be given a new Authorization code to replace it, which may be entered here to upgrade the authorization levels. You may also receive a new code if you purchase upgrades or need to license the software for additional parks, sites, or workstations.

Notes

The Notes fields are used to add an Additional Notes section on the printed the Ticket Form of reservation and transaction receipts. You can have up to 3 notes of any length (assuming they fit on the printed page), and each of these notes will appear in a separate "box" on the receipt (it will have a border around it to separate it from the other notes).

Each note can be multiple lines, but is entered as one long line in the dialog field. If you type a long note, it will automatically wrap to multiple lines as needed on the receipt. But you can also control the formatting with the use of the "new line" escape sequence, `\n`. This way you can insert blank lines and force multiple lines where needed to format the note.

Here is a detailed example of a possible note field using multiple lines, which would be typed in one long string:

Please keep your campsite clean and free of clutter, for the enjoyment of all of our guests.\n\n -- Avoid storing items under your camper.\n\n -- Please no area mats or rugs, they kill \n the grass for the next camper.\n\n -- No outside clotheslines.\n\n -- Clean up after your pets. Baggies are \n available at the office if you need them.

Notice the `\n` sequences and the spacing, and imagine that you were typing this on a typewriter using the carriage return each time you see a `\n`. If you see `\n\n`, that means an extra blank line will be inserted. The output on the printed receipt will look like this (including the width as it would be on the receipt):

Please keep your campsite clean and free of clutter, for the enjoyment of all of our guests.

- Avoid storing items under your camper.
- Please no area mats or rugs, they kill the grass for the next camper
- No outside clotheslines.
- Clean up after your pets. Baggies are available at the office if you need them.

Sites Setup

This is where you set up all of your campground's rentable commodities -- anything that needs to be reserved on a daily (or nightly) basis. While this primarily applies to accommodations like camping sites or cabins, it can also apply to motel rooms, boat docks, storage sites, ballrooms, or even bicycles and video tapes. It's completely up to you.

You may be limited on the number of site records you can enter depending on the license you purchase. You can see the limit for your license in the View Product Authorizations dialog. You will get an error message if you try to enter more than you're authorized for.

One unique property of this table is that the order of entries is important. The record order (*not* the Record ID number) determines the order that the sites appear on the Rack tab view and how they are sorted in other tabs or drop-down boxes. Therefore you should plan the order before adding sites here, but don't worry about needing to insert records later -- you can use the [Raw Data Tables](#) function (discussed later) to insert sites where you need them.

Actually, the Raw Data Tables dialog is a much easier way to add a large number of sites, since you can copy fields from one site record to many sites at once in the data table grid. But for adding your first few sites or for viewing and changing individual sites, you should use the Sites Setup dialog.

Although you can delete a site, don't delete any site that has been used for a reservation! This would result in an undefined site link if you ever view a reservation for this site, and also will affect the accuracy of reports. Only delete a site if it has *never* been used for a reservation, for instance when you are setting up sites for the first time. If you need to "remove" a site later, you should use the [Site is Inactive](#) flag discussed below.

The individual site fields are described below. Note that some fields may not appear for you, for instance if the field has been disabled in your database (see [Define Data Fields](#)).

Note: Manager access is required to change the site details.

Abbreviation, Common Name, and Description

These fields should all describe the site, in increasing length and/or detail. Each one is used in different places to represent the site.

The Common Name is used in most places where sites appear as a cell in a grid, such as Tab view reports, and in places where a full name is used like when viewing a reservation. You may want to include a word like "Site" in this name for clarity, like "Site 35" or "Lot 35", or you can be more specific like "RV 35" or "Tent 35". It should be limited to about 10 characters for the best results.

The Abbreviation is used where a shorter name would work best to save room or where "Site" would be redundant, such as in the rack "Site" header cells, the drop-down Quick-Pick list on the New Reservation dialog, and on the printed reservation receipts. Typically this is just an identification number like "35" or "C-35", but it should be unique -- don't use "35" for both RV lot 35 and boat dock number 35.

The Description is optional. If it's available, it's used in the pop-up tips whenever you move the mouse over a site name cell on the grids (either the row/column headers in the Rack or their fields in the other Tab views. If no description is available, then the Common Name is used. While this can be as long as you like, it works best when 20 or fewer characters are used. This is just so it doesn't obscure too much of the screen when it pops up. Examples: "Site 35 - 30A/W/S", "Site 35 - Maple St.". The use of this field depends on what helpful information you would like to see when you move the mouse over a site's cell.

Park Selection

This is a drop-down list with a list of the defined Park records (usually only one selection). You should select one of the parks for the site even if there is only one park defined, since it's used to determine which park's information is printed on the reservation receipts. See the *Parks Setup Dialog* section for more information.

Address lines

You can fill in these if you want the receipts to show the message "Have visitor mail sent to:", and the 2 lines of address information. Only 2 lines are available, so it's suggested to use one line for the street and lot number, and the other for the city/state/zip. Since these fields are only used for printing purposes, they are optional.

Phone numbers

As with the address lines, these are optional and only used to print "Your phone number(s):" on the receipts. You can enter 1 or 2 phone numbers, and these would typically only be used if the site has a fixed phone number, such as for instant-phone sites.

Site Front/Rear/Left/Right

These fields allow you to indicate which site is physically in front of, in back of, and to the right or left of this site. They are not used in any particular way other than for reference, since they only appear on this dialog, so they are not required. (In future versions they will allow support for functions like automatic selection a number of adjacent sites or to assist in making "buddy" or group reservations.)

Since each one of these is a drop-down list of all sites defined, one obvious problem is that you can't fill in this field until all of the sites are defined. So you would need to go back through the sites after setting them up to set these fields.

Site Class and Site Type

These are pick-list selections, which you can define. They are attributes used in the Site Preferences selection when making a reservation, so you can set them according to what would help select appropriate sites. They are covered in more detail in the *Pick Lists* section. In addition, Site Type is used in nearly every filtering or selection process, so it is the most important field for site categorization.

More Site Attributes

This button opens the Site Attributes dialog, which is a list of attribute fields (including some of those above). In general, these attributes are used to filter out acceptable sites for a reservation, using the Site Preferences function on the New Reservation dialog. The site attributes here will correspond to the site preferences for a reservation.

Any attributes that are set will also show up in the Quick-Info window (double-click on a site name in tab views), so they can provide useful information to a customer when making a reservation.

The initial database will have many typical attributes by default. You will want to disable any that don't apply to your campground, and may want to rename a few to something more applicable. (This is done through *Define Data Fields*.) The number and the detail of these selections will depend on your campground -- a large diversified RV resort may have sites with many different attributes to choose from, while a small campground with mostly similar sites may only have a few. If you are extremely familiar with your park and each site's peculiarities, you may actually never use site attributes/preferences when choosing a site for a customer.

There are several different types of site attributes, and setting them in the Site Attributes is a little different for each one. In general, if you plan to use the Site Preferences dialog to select sites, you should set these fields appropriately for every site. If you leave an attribute blank, then the site may be assumed to be a match anyway (because the software doesn't know if it's a match or not). To enter any attribute, click on the right-hand cell next to the name and type the value, or double-click on the cell to drop down a pick list. If you're editing several in a row, you can use **Tab** after each one to step to the next one.

Pick-Lists -- These are simple drop-down lists, including the Site Type, Site Class, etc. Just select the appropriate selection for each site. If you leave it blank, the site will match to any request for that attribute. Note that some of these are duplications of the fields on the Site Setup dialog, and setting them here will also be reflected in the Site Setup dialog.

Sizes -- Some attributes are sizes, such as maximum rig length. Sizes are assumed to be measured in feet. You should put an appropriate size here, so that any request for that size **or smaller** will be a match. Just type in a number, no punctuation or other characters (for instance, type **45**, not **45 feet**). If you leave it blank, any size request will be considered a match.

Yes/No attributes -- These are fields that are either true or false, like Has Water, Has Sewer, etc. Their value can be either Yes or No, which can be chosen from the drop-down list. Alternatively, you can just click the field and press the **Y** or **N** key. A blank attribute will be treated the same as No.

Distances and Ratings -- These attributes are "ratings", and have a value of 1 to 5. Either way, a 1 means "low" (or "far") and a 5 means "high" (or "close"). For instance, Distance to Pool would be 5 for the closest sites and 1 for the farthest sites. View Rating would be 5 for a great view, 1 for a poor view. If the customer requests "Must Have" for one of these attributes, they will currently be a match as long as the value is 3 or above, or if it is blank (meaning not applicable or unknown). If they request "Must Not Have" then it will be a match if the score is 3 or lower. (Thus a rating of 3 will always be a match.) Future versions of the software will generate scores based on the how well the values match, and allow selection by how well a site score compares with the requests.

Site is Inactive (disabled)

This flag can be set when you want to completely eliminate a site from being used. This will eliminate it from the Rack, the Quick-Pick drop-down list for New Reservations, and the Occupancy Report. However, any existing past or future reservations with this site will still show up in other historical reports.

This is useful if you have eliminated sites from the campground for an undetermined time, or forever. It's better to set this than to actually delete the site from the database, because it will still be used in reports and reservation histories.

Min Stay and Max Stay

These represent the lower and upper limits on the number of nights allowed for a site. For instance, if you have sites where you only allow short-term stays, you can enter a 30-day maximum. Likewise, you can enter minimum stays for sites that are limited to extended stays. Only enter the number of days here without text, e.g. just enter "30" for 30 days or a month, not "30 days" or "1 month".

These limits are used on the New Reservation dialog when Show Available is selected. Any sites that are not allowed for the number of nights of the reservation will not be shown in the mini-rack when Show Available is checked.

Electric Meter, Gas Meter and Water Meter fields

If these are enabled, you will see fields for the Reading and the Date, and a button to View the reservation that the meter was last read by. The reservation button will be disabled if the last reading was entered manually (on this dialog) rather than entered as a reservation transaction. The date will be disabled if no reading has been entered (which typically means that this site does not have a meter).

Assuming this site supports meter(s), you will first set up the site by entering the current reading (or the last reading that has been charged for). The date will automatically change to today's date when a value is entered, but you can override that if needed. If a meter is brand new and has a "0" reading, you should still enter a 0 in the Reading field so that the site is flagged as having a meter.

There is no way to select a reservation for the reading other than going to that reservation and entering a transaction for the meter reading. This is the way it should be done whenever a reservation is paying for the metered electricity, gas or water. Otherwise the reservation link will be cleared. Also note that if it's important that you have the reservation information when first entering the meter readings, this could be done by entering it as a transaction for the reservation (you can delete the charge afterwards but the site will remain updated).

Season Dates Available

This field is used to specify the dates that a site is normally available. This information is used for showing what sites are available for a given date and also can be used to generate more accurate reporting. While it's possible to create a reservation that covers dates that are "out of season", you would be warned before doing so. These dates will also show up on the Quick-Info window for sites (seen when double-clicking on a site name in the tab views), and any sites not available due to the season dates (or the special dates below) will be shown in a different color on the Rack (typically gray)

Dates in this field and the other two Special Dates fields can be entered as single dates or as date ranges. You can also enter dates without the year if you want to specify dates that apply the same to every year, but this only applies to the Season Dates, not the Special Dates. If you leave this field blank, it means that the site is available all year long (so there's no need to enter **1/1 to 12/31**, and in fact that could slow the

software down slightly).

Note that the dates in these fields will be entered in the "regional" format according to your computer's settings -- for instance, month/day for U.S., and day/month for Canadian, etc. U.S. format is used in the examples.

There is no limit to the number of dates or date ranges you can enter, and the field will scroll as needed. Separate each date range with a comma. A space after the comma is optional (it will be inserted automatically when displayed). The format of a date is fairly flexible as long as it follows the month/day/year convention. Each range should include two dates separated by the word "to". Here are some examples of valid range entries:

1/1 to 9/30, 11/1 to 12/31 (note there are no years, so it applies to every year)
1/2/2002 to 4/3/02 (years can be 2 or 4 digits)
10-5-01, 10-7-01 to 12-31-01 (single dates can be entered, and you can use the dash in a date)

Regardless of the date format you use, it will be changed to a common format (mm/dd/yyyy) after you save the information. If you make a mistake in an entry, it will warn you when you click Save and ask you to fix it.

While you could clear out old date ranges once that year has passed, you may want to leave them so that reporting is still accurate for past years.

Special Dates Available

Special Dates Available take precedence over season dates in determining if a site is available. Even if you have specific seasons, there may be times when you want to make some sites available out of season. You could just adjust the Season Dates if you enter the dates for each year separately, but if you use the same Season Dates every year (entered without years, like **3/1 to 9/30**) then you need to enter any exceptions in this field.

The Special Dates Available field follows the same formatting as Season Dates, with the exception that they should always have a year in them. (Otherwise you would be better off adjusting the Season Dates.) They will also show up in the Quick-Info window for sites. It's OK to have dates here that are considered available by the seasons anyway, but it would add work for the software so it's best to avoid overlapping dates. Note that dates can also be made available from the Make Site Available function on the Rack view right-click menu. This field will change accordingly with the added date(s).

Special Dates Unavailable

This is the highest priority of the date fields. If a date is included here, the site will be considered unavailable this date even if the same date is in both of the Dates Available lists above. Use this to make a site unavailable at any time, such as for maintenance. Dates in this list should always have years in them. They will show up in the Quick-Info window for sites, and will show up as a different color on the Rack. Note that dates can also be made unavailable from the Make Site Available function on the Rack view right-click menu. This field will change accordingly with the added date(s).

Weekdays Available

If these fields are enabled, it allows you to indicate which days of the week the site is available on. (For speed reasons, don't enable these fields unless it's necessary.) The weekdays can be overridden by Special Dates Available or Special Dates Unavailable.

Notes

The Notes field has no particular use except that it shows up in the Quick-Info window for sites (double-click on a site name in the tab views), so you could check it before making a reservation. This is a good place to put warnings or special features of a site, like "gets flooded easily" or "great site for bird-watchers". While it can't be used for automated site selection, it might be a nice touch to put notes here that you can tell customers on the phone when they're making a reservation.

Notes will be shown as a single line here, but you can enter multiple line notes as long as you like by clicking the "..." button at the end of the notes entry field. This will open a separate Notes dialog for entering the notes (covered in the *Working with Reservations* section). Any current notes will of course be shown, and the cursor placed at the end so you can begin entering notes immediately. When multi-line notes are displayed as a single line, for instance on the Site Details dialog or in lists, each line break will be shown as a double-backslash (" \\ ").

Taxes Setup

The Taxes setup is a simple dialog showing entry for 5 tax rates. For each rate, simply select a Transaction Category to use for it (each tax rate **must** have its own transaction category), enter the rate, and enter a description if desired (optional, it is only seen on this dialog). Tax rates defined here are used for Rates, and also for manually entering taxes on Transaction dialogs.

By default, you may see 1 or 2 tax rates already defined when you set up your database. Feel free to change these. To delete a tax rate, simply change its category to be blank. Then it will no longer show up wherever tax rates are used.

If you don't have a category set up for each tax rate you need to define, go to the Pick Lists and add appropriate Transaction Categories first. The order or position of the categories in the Transaction Categories pick list doesn't matter. These categories will allow you to create reports showing the amount of each tax collected, and will also allow the Transactions dialog to correctly calculate the tax.

Note that the tax rate is a multiplier, not a percentage. Thus, 6.25% should be entered as **.0625**. Any time the tax rate changes, just come back here to change the rate.

The "Default?" field in the tax definitions indicates which rate(s) will be selected by default when adding manual charges. This usually applies only to counter sales or other non-standard charges since Rates will be defined for site rentals, so Sales Tax rates are normally selected as a default. Note that this doesn't automatically determine the tax used, it simply saves time when adding charges by pre-selecting the designated tax rates.

Important -- once you set up Rates, never change the position of these tax categories. This is because the Rates are defined as being taxable by tax rate number (1, 2, 3, 4 or 5), so if you switch them around then you will have to change every Rate definition.

Rates Setup

Rates are basically a shortcut way of entering multiple transactions with pre-defined categories, descriptions, and dollar amounts (multiplied by the appropriate quantities). Taxes can be automatically applied, and you can specify what kind of quantity multipliers will be needed -- a number of day/weeks/months, or number of sites, or a variable quantity such as number of gallons. The primary use for rates is for site rental rates and add-on charges, but they can also be used for electric, gas and water meter support, merchandise, credits, and anything else for which you want to "memorize" transactions.

Start by opening the Rates Setup dialog ([Maintenance](#) | [Park Setup](#) | [Rates](#)). This will list any rates already defined (if there are any), with their Rate Type, Rate Code, Rate Name, and a value for Each item. From here you will add or edit rates, delete obsolete rates, and move rates in the list. Moving rates in the list is important because the order that they appear here will be the same order they appear when they are selected when entering transactions. Therefore you may want to put them in a logical order, or at least put the most-used rates at the top.

The Rates Setup dialog starts by showing All Rate Types (all rates defined), but you can select any of the other types to narrow down the list. If you select a specific type here, then that type will be assumed when you add or insert a new rate definition (but the type can be changed later). You can also [Print](#) the shown list at any time.

The basic procedure for defining a Rate is to select a rate type, click [New](#) or [Insert](#), and then enter the details of the rate definition including the applicable site type, discount, taxes, dates, and each of the transactions (charges, etc.) that make up that rate. You can edit any of the existing rates by clicking on the rate in the list and selecting [Edit rate definition](#), or you can double-click on the rate in the list.

Warning -- Once a rate is edited or deleted, there is no way to Cancel the operation -- the changes are permanent once you leave the Edit Rate dialog and come back to the Set Up Rates dialog. (Moving rates is also "permanent" since there is no Cancel button, but you can always move them back.)

Rate Types

There are seven different rate types. While these types cannot be changed, you can have as many different rates of each type as you like. Note that the Rate Type for each rate can be changed later, so you can move them to a different category easily.

Rental Rate -- This is for your basic site rates for daily, weekly, and so on for each Site Type you've defined. Of course if you have sites set up for things like craft halls, bicycles, etc., then those rental rates would also go here. You will likely define separate rental rates for each discount (none, Good Sam, FMCA, etc.), and you can also define the dates that each rate apply to. If you have different rate possibilities for one site type, for instance 30A and 50A service, you can either define these as two separate rental rates or define one base rate with a 50A add-on. The choice may depend on how many different rates you will have (to keep the lists short), or how you want it to appear on the receipts (as one rate charge or as two charges; one for base and one for the add-on).

Add-On -- This is for any extra charges on top of base rental rates, such as for 50A electric, phone, extra people or vehicles, and so on. However if your rate structure is very simple, you may elect to put the add-ons in the Rental Rate section so that they are all listed together, or perhaps just set up separate rental rates for with and without the add-on.

Day Fee -- This is primarily for Day Pass reservations, but can also be used for other rates if you like. Typically this would be rates that are based on the number of days, but not for any particular site. Examples might be golf course fees and tours.

Electric Meter, Gas Meter and Water Meter -- These are special rate types for meter readings. They are special types because when they are used, a dialog will open up to enter the new reading -- the site information is updated automatically and it will put the meter readings in the transaction descriptions. When defining the transactions for these types, a suggested item description for the charge is something like "Metered kwh:", so it comes out on the receipt like "Metered kwh: (1000-800)". Note that these rate types will always appear in the list when setting up rates, but they will not appear when selecting rates for transactions unless you have sites set up with the appropriate meter type(s) enabled.

Credit -- You can use this rate type for any standard credits that you apply, such as coupons, rain-out credits, etc. You don't need to use this for discounts like Good Sam, since you can define rental rates with the discounts included. You probably also won't use this for refunds, since those can be handled by selecting the appropriate rental rate and applying it as a negative charge.

Merchandise -- This rate type can be used for any non-rental merchandise, such as propane, RV supplies, gift shop items, and so forth.

Miscellaneous -- This is for "anything else" for which you want to memorize transactions. Typical uses would be for standard deposit transactions, cancellation fees, membership cards, tour packages, etc.

Again, the Rate Type selection for each rate you define is somewhat up to you. The only "special" types are the meter types. Keep in mind that the Rental Rate type will be the default rates shown when selecting rates for a transaction, so any rates defined as Rental Rates will be the quickest to select (any others will require two extra clicks to select the appropriate type from the list). Also, the Merchandise rate type will be automatically shown when selecting rates for an Unbound transaction or Customer transaction.

Edit Rate Definition Dialog

When you select New, Insert, or Edit from Rates Setup, the Edit Rate Definition dialog will appear. This is where you define all of the details of the rate.

Make sure that the desired Rate Type is selected (this can be changed any time), and enter a Rate Code and Description. The Rate Code is primarily used to select rates quickly with the keyboard, so it is optional but should be short and unique for each rate. (In future software versions it may also be used for reports.) The Description is shown in the rate selection list, so you should make it simple but also descriptive enough for easy recognition. If this rate is for a discount, for instance, you should indicate that in the description so the correct rate is chosen.

Rate Transactions

Next is the Transaction Template section. This operates just like the New Transactions dialog, except that no quantities are entered here, and instead of transaction entry dialogs opening you will use the grid-entry method to enter the data. Add each transaction that you want to appear for this rate, and enter an Each amount (how much for each day, or week, or item, etc.). The Each amount will later be multiplied appropriately.

Typically you will simply enter a Charge transaction here, with the appropriate category, description, and amount. Note that in some cases the description will be modified later, for instance if the charge is for multiple sites, it may add "(5 days x 2 sites)" to the description. Electric, gas and water meter charges also have their descriptions altered (see the Rate Types explanation above).

You can also add appropriate discounts here. For instance, it's recommended that for a Good Sam rate of \$18, you add a Charge for the standard rate or \$20, and then add a Discount of \$2. This will be more descriptive on the receipt and also allow you to generate reports about the discounts.

If you typically only add charges when the customer checks in, you could even include the Payment here to save a step later. Just be sure you delete or modify the resulting charge if they don't pay in full when they check in. (Also see the notes about adding tax below.)

Taxes

Important -- Although you can add Tax transactions manually, it's recommended that you use the Auto-add tax check boxes instead. Otherwise you will have to edit every rate definition any time the tax rates change.

One exception to this would be for special cases where the tax does not apply to the entire rate charge (less discounts). For instance, if you add a Credit to the rate as mentioned above, the Credit transaction would not be taken into account for taxes -- taxes are **only** calculated based on the Charges and Discount transactions. Therefore you would have to add the tax as a separate transaction and not use the auto-add tax feature if the Credit should reduce the tax.

Another exception would be if you your "rounded" include tax, such that exact calculations are difficult without rounding problems. For instance, if your daily rate is \$23.00 but that already includes a 10% tax, it may be easiest to enter charge and tax transactions separately so it always comes out exactly \$23.00 per day.

Now, assuming you didn't add tax manually, check the appropriate Auto-add tax boxes. There is one box for each of the 5 possible Tax Rate definitions, but only those that are active will be enabled (and will show the selected category name for the tax). When you check these boxes, the With Tax amount is automatically calculated.

Multipliers and Filtering

The rest of the dialog entries generally only apply to Rental Rate and Add-On rate types. However if this is any kind of merchandise or other item that may have more than one quantity *other than periods or sites*, make sure that Ask for other quantity is checked. That way a Qty entry field will appear when you select this rate.

To have a rate multiplied by the number of days, weeks, etc. in the reservation, fill in the Rate is per field and select a period from the (# of) drop-down list (days, weeks, months, or years). Also be sure to check the Multiply by # of periods check box. Note that this and other multiplications are semi-automatic. A box will appear when the rate is selected with the number of periods filled in, but it can be changed before accepting the rate.

If this rate only applies to a certain Site Type, select that type from the drop-down list next to Applies only to Site Type. If no site type is selected, the rate will show up for any reservation. If you select a site type here, then that rate will only show up when a reservation is for that site type (or has a concurrent reservation of that type). If the rate applies to more than one site type but not all site types, then you will have to duplicate the rate for each site type (since only one Site Type can be selected for each rate), or else leave the Applies only to Site Type field blank so it will show up for all of them (and make sure the description is clear enough so it won't be selected for the wrong site types).

Likewise, you can have a rate apply to a specific Site Class, using the Applies only to Site Class field. This is useful if you have your Site Types set up to be very specific, but want a single rate to apply to several of them. You can then set up your Site Class definitions to be more general for setting different rates.

For most rental rates you will want to check the box for Multiply by the # of concurrent sites. An extra box will appear when selecting this rate, with the number of sites to multiply by. If the number is greater than 1, then the description on the resulting charge(s) will be modified, with something like "(5 days x 3 sites)" added.

If this rate should be used for extended-stay reservations for monthly billing calculations, check the Use for monthly billing option. This must be checked in order for the rate to be used for monthly billing automatic charges. However, you must also avoid setting this for rates that don't apply, otherwise it could apply more than one rate to a monthly bill.

You can filter the rates by discount by either selecting a discount from the Applies only to Discount list, or by checking the Only applies if no discount used check box. (If this box is checked, the discount selection would be ignored). As with Site Type, this will determine whether the rate will appear in the rate selection list for a given reservation.

The Ask for other quantity check box can be checked for any rate, which will allow a separate quantity entry field to appear when the rate is selected. Generally this is not used for rental rates, but can be used for Add-On rates like extra people or vehicles, and for any other kind of rate.

The Ask for meter reading check box should be selected for any meter-reading rates where it will be multiplied by the metered amount (e.g. kwh for electric meters.) This is used as a flag for the special meter-entry dialog.

You can set up the rate to show up on a list only if the reservation is longer or shorter than a given number of days, by setting the Applies if >= days and Applies if <= days fields. For instance, there's no reason to show monthly rates if the reservation is less than 20 days or so. In this case, you would want to base the days on how many days it would take for the monthly rate to be more economical than the weekly rate, for instance. This could also be used for "3-day special" rates, etc., to show the rate only if they are staying more than 3 days.

Be careful about setting the maximum days, however. It may be tempting to set the daily rate to only show if they're staying less than 7 days, but then if they stay 10 days you would not be able to apply the daily rate to the remaining days. This should only be done in special circumstances, perhaps if you have 2 different daily rates -- one for short-term stays and another for pro-rating long-term residents.

The Applies if reservation field... selection permits a great deal of control over when a rate is used. This specifies that the rate applies to a particular "preference" setting in the reservation or one of the "# of" or value fields such as number of adults, extra vehicles, or rig length. This option is most often used for add-on rates, such as for adding \$1.00 per extra person, but can also be used to indicate a special rate if they need 50A service, for instance.

To use this option, select a reservation field from the list. If the field is an attribute/preference field, such as "50A", then the rate will apply only if that preference is set to "Must Have" for the reservation.

If the field is a numeric value, additional settings will appear that need to be entered. You will first enter a value for "is >=" to indicate when the rate applies. For instance, if you charge for any adults *above* 2, then set this value to 3. Next you can specify that the rate is "Per each more than", which means that it will be multiplied by the value minus some number. For instance, set this value to 2 in the previous example to charge for every adult above 2 adults. Another example would be a charge for all extra vehicles -- set "is >=" to 1, and "Per each more than" to 0.

Rate Dates

You can define the dates for which any rate is applicable. This will be used whenever selecting a rate for a reservation, and will only show the rates that are applicable on at least one day of the reservation. For instance, if a reservation includes a holiday, you will see both the normal rate and the holiday rate in the selection list. Likewise, when you select the holiday rate, the quantity that appears for the number of days will be just the number of days that the reservation date occurs on the rate's applicable dates.

For example, if the reservation is for 5 days and includes 3 holiday days (e.g. for a holiday weekend rate), then the holiday rate will be multiplied by 3 days and the normal rate will be multiplied by 2 days (assuming the rate's dates are defined to be mutually exclusive). Although you will have to select both rates, the numbers will be handled for you automatically.

Defining dates for a Rate definition is just like defining dates that a Site is available.

Season Dates Applicable

This field is used to specify the dates for which the rate is applicable. Dates in this field and the other two Special Dates fields can be entered as single dates or as date ranges. You can also enter dates without the year if you want to specify dates that apply the same to every year, but this only applies to the Season Dates, not the Special Dates. If you leave this field blank, it means that the site is available all year long (so there's no need to enter **1/1 to 12/31**).

Note that the dates in these fields will be entered in the "regional" format according to your computer's settings -- for instance, month/day for U.S., and day/month for Canadian, etc. U.S. format is used in the examples.

There is no limit to the number of dates or date ranges you can enter, and the field will scroll as needed. Separate each date range with a comma. A space after the comma is optional (it will be inserted automatically when displayed). The format of a date is fairly flexible as long as it follows the month/day/year convention. Each range should include two dates separated by the word "to". Here are some examples of valid range entries:

1/1 to 9/30, 11/1 to 12/31 (note there are no years, so it applies to every year)
1/2/2002 to 4/3/02 (years can be 2 or 4 digits)
10-5-01, 10-7-01 to 12-31-01 (single dates can be entered, and you can use the dash in a date)

Regardless of the date format you use, it will be changed to a common format (like mm/dd/yyyy) after you save the information. If you make a mistake in an entry, it will warn you when you click Save and ask you to fix it.

You can clear out old date ranges once that year has passed (and add new ones for upcoming years). Unlike the dates for Sites, there is no need to keep old dates in the lists since you probably won't be adding transactions to old reservations.

Important -- When defining rates for different seasons, make sure that there are no gaps or else there may be times when no rates appear (or they don't multiply by the correct number of dates). Likewise it's a good idea to avoid overlapping. Therefore if you have a special holiday rate with a Season Date of **7/4**, then your normal rate definition should have **7/4** in its Special Dates Not Applicable Field to exclude that date from the normal rate.

Special Dates Applicable

Special Dates Applicable take precedence over season dates in determining if a site is available. Even if you have specific seasons, there may be times when you want to make some rates available out of season. You could just adjust the Season Dates if you enter the dates for each year separately, but if you use the same Season Dates every year (entered without years, like **3/1 to 9/30**) then you need to enter any exceptions in this field.

The Special Dates Available field follows the same formatting as Season Dates, with the exception that they should always have a year in them. (Otherwise you would be better off adjusting the Season Dates.) They will also show up in the Quick-Info window for sites. It's OK to have dates here that are considered applicable by the season dates anyway, but it would add work for the software so it's best to avoid overlapping dates.

Note -- Since this is an *exception* list, you can't just put the normally applicable dates here -- use the Season Dates field for the normal range. The Special Dates Available list simply overrides "out of season" dates to be applicable.

Special Dates Not Applicable

This is the highest priority of the date fields. If a date is included here, the rate will be considered not applicable on this date even if the same date is in both of the Dates Applicable lists above. Dates in this list should always have years in them.

Weekdays Applicable

These checkboxes allow you to indicate which days of the week the rate is applicable on, which is handy for specifying weekday / weekend rates. Note that the weekdays selected can be overridden by Special Dates Applicable or Special Dates Not Applicable, so take care in specifying special dates in these cases.

If you don't have any sites that are available based on the day of the week, then you should disable these fields (see *Define Data Fields*). This will improve the speed of the program.

Notes

The Notes field is just for your own notes, perhaps an explanation of why a rate is set up the way it is. The Notes are never seen by the customer or by an operator selecting a rate. It can be any length.

Operator Setup

The Operator Setup dialog can only be viewed by an operator with Administrator access, because all operator passwords are visible here. This is where an administrator will set up all operator logins for the software. Note that since the operator table is stored with the database, operators will be backed up and restored with it. This is necessary because the operator information is logged with every reservation and transaction. If you start a new database, you will need to set up new operators for it.

There must always be at least one operator defined with Administrator access. (Otherwise you could never access critical functions, or add an operator that could.) Therefore, if a database is loaded that does not have an Administrator operator, you will see a warning and it will automatically set one of the operators to Administrator (it will tell you which one). A new Administrator operator will be added if no operators exist.

By default, the database will start with one operator, with Administrator access. The login parameters for this operator will be:

Login: **Administrator**

Password: **Password**

Obviously this is not a secure situation -- besides being too obvious, anyone with access to this manual (or the software's Help function) can find out how to get in to the system. Therefore you should immediately change this operator information. At the very least, change the password to something not easily guessed.

Also, you should assign the Administrator access level very sparingly. While it would be convenient to make yourself (or everyone) an administrator, it opens up the possibilities of making disastrous changes by mistake. We recommend having one or two administrator logins assigned, and make them *in addition* to the logins you use on a daily basis. The campground managers should have Manager access for daily use, and any other users should have Reservations or Clerk access as appropriate.

Always keep your Administrator login(s) recorded and in a secure place where you can remember where to find it. It might be months before you need to use it, so relying on your memory for the password is not a good idea. If you forget the administrator login, it is possible for Cottonwood Software to retrieve it, given a copy of the database file. However it is a hassle (and possible support expense) that you'll want to avoid.

Automatic Login

If you are the only person that will ever use the program, you may want to set it up to automatically log in with your operator name when the program starts. You will have to decide whether it's worth the risk (e.g. if anyone else has access to the computer, they would have complete access to the database), but this option is provided for convenience.

To set up automatic login, you will need to add two parameters to the "command line" of a shortcut icon to the program. To do this, right-click on the Campground Master icon on your desktop (or wherever you start the program from), then click on the Shortcut tab. The Target edit box should contain the full path of the CampgroundMaster.exe file, which is the command line. Go to the end of the line and add the following text, replacing **[login]** and **[password]** with your appropriate login and password:

```
/Operator=[login] /Password=[password]
```

(Note the capitalization of Operator and Password, the direction of the slashes, and the space before each slash.) For example, to log in with the default administrator and password, add this to the command line:

```
/Operator=Administrator /Password=Password
```

Deleting Operators

If necessary, you may delete operators from the system. It won't cause a problem in the database since the actual operator code, rather than a link to the record, is stored in reservations and transactions. However, you probably won't want to delete operators once they are used because you can show Transaction reports based on operator, and operators can only be selected for reports if they are still in the database. If you need to "lock out" an operator, you can either change the operator's password or change the access level to Guest, which would prevent the operator from making any changes to the data.

Operator Code

The Operator Code is the text that will be shown anywhere in the system when referring to the operator (e.g. in reservation and transaction dialogs, report filtering, and the program caption when the operator is logged in). This should be a fairly short word, typically the operator's first or last name. Make **sure** it is unique (and easy to recognize), since it's used to identify this operator. No two operators should have the same operator code. This code should never be changed once it is in use, since that would have the same problems as deleting the operator (see above).

Login

The Login is the operator's ID used when logging in. It's never seen anywhere else in the system, so it can be whatever the operator prefers. It can be the same as the Operator Code, or it can be different. Login names are not case sensitive, so for instance "Walter" is the same as "walter" or "WALTER". This may be changed at any time without any affect on the program or database.

Login names must be unique. Don't use the same login for more than one operator, because it will only see the first one with a given login name when checking the password.

Password

The Password is used by the operator when logging in. Like the Login name, it can be anything the operator wants, and is not case sensitive. It does not have to be unique -- any number of operators can have the same password. Of course this should not be done on purpose -- it's best for each operator to have a unique password, but if two people choose the same password it will not be a problem.

Access Level

This defines the operator's key to the system. There are five different access levels, with increasing access to program functions. They are checked for many different functions, most of which are covered separately with the function descriptions elsewhere in the manual. Here are then general descriptions of the levels:

Guest -- minimal access, can only view the Rack. Cannot make any data changes or save the database (thus cannot make a backup or save a copy somewhere else). Essentially the same as nobody logged in.

Clerk -- has access to transactions and functions suitable for a point-of-sale or to accept payment for reservations, but cannot make or change reservations, perform any maintenance functions, or make program option changes.

Registrations -- Can access any reservation functions and reports, and can backup the database, but cannot restore the database perform other maintenance functions, and cannot change old transactions.

Manager -- Can access all report and option functions, plus restore the database, edit or delete old transactions, and edit Site details, but cannot access other maintenance functions.

Administrator -- can do anything.

Notes

The Notes field is only seen on Operator Setup dialog, so it can be used for any notes the administrator wants to make about an operator. Like other notes fields, it can be any length and format. Typical notes might be phone numbers or other contact information (in case a question arises), and information about temporary operators (like work campers) that might be of interest years from now by new campground managers (or auditors).

Notice Message, Confirmation Letter and Window Tag text

These setup dialogs simply allow you to edit the text used for these sections of receipts.

The Notice text should remain approximately the same size so it fits in the designated areas of the receipts. The Notice dialog shows approximate formatting and the text should fit in the box shown.

The Confirmation letter text may be just about any length (allowing space for transactions, etc. below it). You can also add line breaks, blank lines, etc. using the Enter key just like typing a letter.

Likewise, the Window Tag bottom text can be as large as needed, with the limitation being the size of half of the page. If you don't need text on the bottom of the window tag, just clear out the entire edit box

Pick Lists

Pick Lists are the tables of values used to make data entry quicker. In addition, they are useful in limiting possible values for certain fields so that data integrity is assured, and so that meaningful categorized reports can be generated. The pick lists for site attributes also help categorize sites to make site selection easier.

A new database is initialized with populated pick lists that serve as a guide. While some of the entries may be useful, you will likely want to remove and change some, and add some of your own. This is done easily with the dialogs. A pick list may be any length, but use discretion when filling them -- long lists are more difficult to choose from, and can cause problems displaying the list in a drop-down box if your screen is too small.

The order of the items in each pick list is important -- this is the order in which they will always appear in the drop-down lists or other selection lists. Besides making the order logical to the operator, you will want to pay attention to the first letters of the items, because those can be used to quickly select the items. You can try to make each first letter unique, but if that results in confusing names then the next best would be to put the most-used items toward the top. Or instance, if you have "Tent" and "Trailer" in the Rig Types list in that order, pressing **T** will select Tent, and pressing **T** again will select Trailer. If you use Trailer much more than Tent, you might want to switch the order so that Trailer comes up first. (Or in this case you can just remember that **TT** means Travel Trailer, a convenient coincidence since TT is often an abbreviation for Travel Trailer.)

Note: If you already use QuickBooks and plan to export transactions to QuickBooks, you may want to base your setup of Transaction Categories and Payment Methods according to your QuickBooks accounts, to make the transactions in Campground Master map easily to your existing accounting system.

Changing Pick Lists

You can add pick list items any time you like. So if you add cabins to your campground, you can easily add a Site Class and/or Site Type for cabins. You can even insert it into the list anywhere you like, since the order of the lists don't matter to the database -- it won't cause problems with existing records. The Index field is the important part (that's how the pick list items are referenced), and you will see that when you move pick list items around in the list, their Index stays with them. When you add or insert a new item, a new unique Index will be generated for it automatically.

IMPORTANT! Once the pick-list is in use you should *never* change the names of pick list items to something that has a different meaning, and you should *never* delete a pick-list item. (Note that when a pick list item is deleted, its Index is discarded and cannot be re-used, so there is no way to get it back short of restoring the database from a backup!) Of course if you're *sure* that an item has never been used in a database record, then it would be safe to delete or change. If you stop having a need for one of the items (for instance if you no longer accept one of the payment types), the best thing to do is to just move it to the bottom of the list. It will still be available for reporting, and more importantly it won't corrupt the database, but will be out of the way.

On the other hand, you are free to change the text for any pick list item. As long as it still represents the same thing, it won't cause any harm. The new name will be shown in any existing records that used the pick list item automatically (because the Index field is unchanged), so feel free to make changes like "highway sign" to "road sign" or "billboard". But don't make changes like "Visa" to "Discover" -- use the Move Up and Move Down functions instead, if you just need to change their position.

Pick List Dialog Functions

Each of the Pick List editing dialogs consists of a grid with the pick list table and some controls at the top. The controls are detailed below.

Warning! -- All changes made in this dialog are permanent, there is no way to cancel them!

Allow Editing of Fields -- This is simply a safeguard against accidental changes. By default, all of the dialog's controls except **Print** and **Close** will be disabled, but you can look around the table. If you plan to make changes, check this box so that the controls are enabled and you can make changes in the grid. Note: leading and trailing blank spaces will be automatically trimmed from all entries after editing.

New Record -- This will add a new pick list item to the bottom of the list and move the cursor to it, ready for typing.

Insert Record -- This is used to insert a new item in the list somewhere other than the bottom. First click on the item in the grid that you want the new item to be **in front of**. Click **Insert**, and a new pick list item will be added at that point, moving the others down.

Move Up and **Move Down** -- Use these to move items in the list to new positions. Just click on the item to move, then click the **Move Up** or **Move Down** button.

Print List -- This will print the pick list grid. It uses all of the same print options as used for the other grids (tab views, etc.).

Delete Selected Record(s) -- This will delete (permanently!) any of the items selected in the grid. Just select one or more items (using **Shift-Click** to select a range or **Ctrl-click** to select multiple items), and click the **Delete** button.

Close -- closes the dialog. Since all changes were already made immediately, there is no **Cancel** option.

The Grid -- This is the list of pick list records (items). If editing is enabled, you can edit any text (except the **Index** field) by clicking on the cell and typing (which will replace the existing text with what you type), or by double-clicking on the cell to enter edit mode (where you can edit the text without deleting it). Note that while you are in a cell, you can abort the changes by pressing the **Esc** key. Once you leave the cell, however, the changes are permanent. Any cells that have been changed will be shown with a light yellow background.

You may notice that the grid can't be sorted by a column the way most other grids can. This is because the order of the items is important, and sorting (even temporarily) could cause confusion when adding items to the list.

Pick List Fields

All of the pick lists have the same fields.

Index -- This is the software-generated unique identifier for an item. It cannot be edited.

Abbr. (4) -- This is a short version of an item name (4 characters recommended). It's used in a few places where space is short, such as the **Requests** column on the **Arrivals** tab and the **Type** column for sites on the **Rack**.

Normal Text -- This is the text normally displayed in drop-down lists and the fields on dialogs and reports. It should be limited to about 10 or 12 characters so that it fits in the drop-down lists without being truncated.

Long (40 characters) -- This can be a longer version of the text, but is not currently used by the software.

Description (80 characters) -- This can be a long description, but is not currently used by the software.

Rig Types Pick List

This is used for the customer's Rig Type field. You can define them to be generic (RV, tent, boat), or you can be more specific (Fifth wheel, class A, diesel, etc.). It all depends on how specific you want your records to be or what information is helpful to you for making reservations. You may want to include a "none" value to be used for guests or if you have cabins, etc. where there is no rig needed. Future software versions may support rig type categorization or filtering for reports, so keep that in mind as well.

Site Class Pick List

Site Class is a site attribute that can be used for selecting a site (in a reservation's site preferences). It's intended to be a fairly generic selection of the type of accommodation needed, such as an RV site, tent, cabin, boat, pavilion, etc. The Site Type attribute would be used for more specific selection, so Site Class can be used when the site type is not critical. Just define site classes for the types of accommodations or other rentals you will be defining sites for.

Pad Types Pick List

This is a site attribute that can be used for selecting a site (in a reservation's site preferences). Pad Type selections would typically refer to the type of material that an RV parking space uses, such as grass, gravel, concrete, etc. Pad types usually refer to RV sites, but you could also include useful selections for cabins (bed type?) or other types if needed.

Site Facing Pick List

This is a site attribute that can be used when making a reservation (site preferences), if the customer has a preference for which way a site faces. It is initialized with common directions (North, West, Southeast, etc.), but it could be used for something more descriptive, replacing the directions with something like "Lakefront", "Pool", "Golf", and "Playground". (There are other attribute fields in the Site table that could handle this as well, but if direction is not a concern then this may be a better way to handle other attributes.)

Site Types Pick List

This is the most important of the site attributes, since it's used on nearly every report for filtering sites and is also used as the basic criteria for selecting appropriate sites. The design of this list can vary greatly for different campgrounds. Selections can be as generic or specific as you like, but keep in mind that the longer the list is, the more awkward it will be to use. Design a list that will be useful for filtering and provide useful reporting categories, and that would work well in the tab views where you can select only one site type.

Remember that there are a number of site attributes than can be used to narrow down a search, so you don't need to have separate Site Types for every combination of 30A/50A, pull-through, sewer, pad type, etc. On the other hand, if all of your sites are basically the same except that some are pull-through and some are not, and perhaps some of the non-pull-through sites have only 30A, then that's only 3 different combinations and would be very manageable as 3 Site Type selections. But if you have more than 5 combinations of site features, then it may not make sense to use each combination as a different Site Type.

How Heard Pick List

This list is used in the reservation records, and is simply to indicate how the customer heard about the campground, or if they are returning customer. It's used primarily for tracking advertising results, in the How Heard Report. This list can get fairly long if you include every possibility, but if that's the information you need then you should let it be long and specific. If you don't do any advertising and only want to know whether they are a return visitor or not, you can use it for that too.

One unique feature of this list is that there should *always* be an item with "Return visit" as its Name text. It doesn't matter where it is in the list or even what Index it has, it just needs to have that exact text (without the quotes of course). This will allow the "Return Visit" item to be selected automatically for a reservation when you select an existing customer from the customer database. It won't break anything if you don't have that selection, but you would lose that bit of automation -- the How-heard field would just need to be selected manually.

Payment Methods Pick List

This list is used for the pay method in any payment-type transactions. Simply include the different types of payment that you accept, to the extent that they are useful for reporting or keeping track of how a bill was paid. You can include anything from credit cards to green stamps if it helps. It's usually a good idea to include the different types of credit cards (Visa, Discover, etc.) rather than one "credit card" field, for the sake of reporting. If you take multiple currencies, you might even want to distinguish between U.S. and Canadian cash, for instance.

Discounts Pick List

This list is used for the Discount-Used field of charge-type transactions, to indicate what discount was used in the calculations (and of course for the Discount transactions themselves). Just include an entry for each type of club discount you accept, plus anything else applicable like Seniors, Students, and perhaps one for Other (you never know when you might give a discount just because the poor guy looks like he's had a bad day).

Transaction Categories Pick List

This list is used for the Category field of most transactions. It should include various categories for the types of charges, plus any categories you need for Expense and Misc. Income. You may want to keep these from overlapping each other or the charges categories, so they can all appear as separate ledger categories.

The list should also contain a special category entry for each of the built-in transaction types (Discount, Payment, Refund, etc.) -- These will be pre-defined and marked "(DO NOT DELETE)" in the description field. Don't delete them! They can be moved, but you probably want to keep them at the bottom out of the way. If for some reason they are deleted, they will be added again automatically the next time you load the database, but damage will have already been done to the database. This is because the Index fields will be different when they are re-added, so old reports may not come out right and printing receipts for previous transactions could be a problem.

Raw Data Tables

Each of the Raw Data Tables selections of the Maintenance menu will open a dialog with a grid showing one of the complete data tables. If you've been using the system for awhile, be sure you have some time to wait if you open the Reservation or Transactions tables, as these can be large and slow to open. These dialogs can only be accessed by an operator with Administrator access.

In general, these data table functions should be used only by someone who is very familiar with the database, because they contain some internal fields that aren't normally seen and major damage can be done if things are changed or records deleted. On the other hand, this is the only place that some database "corrections" can be done. This manual won't cover any specifics about this, but access to these tables may be required when calling for support. Each table has an Allow Editing of Fields check box, which is disabled by default, so that the tables can be browsed without worry.

That said, there are some good uses for the data tables for certain tasks.

Uses for the Data Tables

One potential use for the data tables is to print a list of customers, for instance. You need to use caution because the grid printout can be very large and will result in a report several pages "wide" as well as "tall". You can minimize the printing by using the Print Preview to figure out which pages are of interest. Then when you Print you can enter the start and end pages. If you need pages that are not in continuous range, like 1, 5, and 9, then you need to do three separate Print operations with the start and end pages both set to 1, then both set to 5, then both set to 9.

The grid on data table dialogs can be sorted by any column by clicking on the column header. This can make them potentially useful for finding a particular record, since all fields are available to sort by.

The Sites data table can be very useful if you are setting up your sites and have a lot of site information to enter. Because the grids used here allow you to copy many fields at a time, and make many copies of a field, it can dramatically speed up the process. For instance, it can take only a few seconds to set hundreds of Site Type fields to the same value.

You may have noticed that the Parks table is not represented in the Raw Data Tables menu. This is because the Parks setup requires special handling due to the authorization codes, and cannot be manually edited.

Aside from the uses mentioned above, no changes to data tables should be attempted without consulting with the Cottonwood Software support staff first.

Working with Data Tables

The Data Tables dialogs themselves are very similar to the Pick List dialogs. There is a grid for the table with one record in each row. The controls are the same as well, except that only the Sites table has the Move Up and Move Down buttons (records in the other tables have no reason to be moved).

You will also see a new check box on some of them: Show Links as Index values. When this is selected, any fields that use relation links to other tables (for instance the Site field in Reservations) will show the numeric index value instead of the human-readable form (e.g. the site name). This is for troubleshooting purposes only.

Warning -- Remember that the Sites table and the Operators table are the only ones that are reasonably safe to edit here. The other tables are generated by the software and should only be edited by an expert.

Warning -- There is no Cancel button -- any change you make to the tables is instant and permanent. This also applies to Deleting records.

Editing data tables is basically the same as for pick lists. One thing that can be useful, particularly on the Sites table, is the multi-copy operations. You can do two different kinds of multi-cell copying that can be useful.

Copying one value to multiple cells

This can be used to copy a cell to multiple cells in a column, multiple cells in a row, or a combination (multiple rows and columns in a rectangle).

1. Highlight one cell to copy (click on it once, it should change to a dark blue background).
2. Press **Ctrl-C** (or **Ctrl-Insert**) to copy that cell to the Windows clipboard.
3. Move the cursor to (or click on) the upper left cell you want to paste to so all are highlighted.
4. Use **Shift-arrows** to move to (or **Shift-click** on) the lower right cell you want to paste into.
5. Press **Ctrl-V** (or **Shift-Insert**) to paste the value into all highlighted cells.

Note that if it doesn't work, it may be that one or more cells in the range does not accept the copied text as a valid value. (Cell validation is done each time you change a cell, which could abort the entire paste operation.) Also make sure you have the Allow Editing of Fields box checked.

Copying multiple cells at once

This allows you to highlight a range of cells in a row or column or rectangle and copy them all to another location as a group. It can only make one copy of the cells at a time, however (e.g. you can't highlight one column and copy it to multiple columns at once).

1. Highlight the upper left cell to copy (click on it once).
2. Move the cursor to (or click on) the lower right cell to copy, so cells all are highlighted.
3. Press **Ctrl-C** (or **Ctrl-Insert**) to copy that cell to the Windows clipboard.
4. Click on the destination cell for the upper left cell copied.
5. Press **Ctrl-V** (or **Shift-Insert**) to paste all of the copied cells as a group.

Note that the copied cells are still on the clipboard after the paste, so if you need to paste multiple groups then you can repeat steps 4 and 5 over and over as needed. This is useful for copying many fields in one record to multiple other records.

Define Data Fields

The Campground Master database allows flexibility in what information is stored, both for future expansion and to minimize the amount of "useless" information presented. The Define Data Fields section of the Maintenance menu allows many of the pre-defined data fields to be disabled or enabled to fit the customer's needs. Some of them can also be redefined for further customization (particularly the Attribute fields for site attribute/preferences).

Obviously this is dangerous and should only be attempted by software experts. An Administrator access level is required to access these lists. The information below is presented for reference, but no changes should be attempted without consulting with Cottonwood Software first.

Each of the Data Fields dialogs looks the same. It is simply a grid with buttons for Print List and Close. Unlike the Raw Data Table and Pick List dialogs, there is no "Allow Editing" safeguard.

Each data field definition consists of the following elements (treated like fields in a record or pick list):

- Field ID** -- This is not editable, and is the way the field is identified internally to the software.
- Status** -- This is either "Fixed", "Enabled", or "Disabled" (see below).
- Abbr.** -- A 4-character abbreviation for the field, for when a short header is needed.
- Normal Header** -- The name of the field as usually seen in the program, such as for column headers.
- Long Name** -- A longer name for the field, only used for Attribute fields.
- Description** -- A longer description for the field, not currently used.

The main item of interest is the Status. If it's "Fixed", that means the field is enabled permanently and cannot be changed. Many fields are set this way by default because the program logic depends on them. If the status is "Enabled", then the field will be visible and usable by the software, and if it's "Disabled" then the field will be ignored by the software. A disabled field would not show up on the Raw Data Table dialogs, and is treated just like a blank field if it's queried by the software.

You may want to disable fields that you're not interested in. In most cases, disabling a field will remove its field from dialogs (resulting in less clutter and faster data entry). In a few cases, it will affect the logic of the program. There may be cases where the affects are unpredictable and potentially even cause the program to abort, which is why these should not be changed without the proper expertise.

Fields that are safe to disable include most of the attribute fields (but not the Site Type), customer discount fields (Good Sam, etc.), the vehicle information in customer records, and the number of adults, children, etc. in customers and reservations. You can also disable the reservation flags for Guaranteed, Confirmed, Don't Move, Complimentary (free) Site, Extended, and Group, and the Estimated Arrival Time.

Some fields are Disabled by default. This is because some fields are not needed by most campgrounds but can be enabled if needed. This includes many of the less common attribute fields, some features like metered water, etc. You can change the status to Enabled if you need them.

Warning -- If you change a field to "Fixed", you will not be able to disable it later!

You can also change the Normal Header element of any field, which will affect the header in a few reports but in most cases will have no effect (for instance, it won't change the name of a field in a dialog). The one exception to this is Attribute fields, discussed next.

One Final Warning -- all changes to the data field tables are instant and permanent! It is easy to undo status changes between enabled to disabled, but avoid using Fixed status and be careful about changing field text!

Defining Attribute Fields

This is one area of field definition where it is safe and encouraged to set them up to meet your campground's needs. But there are several rules to follow.

The most important rule is that this applies only to fields that have a Field ID starting with **Attrib_**. These fields are recognized by the software to be attribute fields, and will show up in both the Site Preferences list from New Reservation dialogs and the Site Attributes list from the Site Setup dialog. The same Field ID's are used in both the Sites table and the Reservations table, although the reservation fields would more appropriately be called "preferences" rather than "Attributes".

The next rule is to make sure that the Attribute fields in the Site data fields table matches the Attribute fields in the Reservation data fields table. This means that the same ones must be enabled in each table, and that they should have compatible names (the Normal Header text). We say "compatible" names because they don't have to be exactly the same text, but should make sense as an attribute/preference pair. For instance, you may have a site attribute of "Has Patio" and a corresponding reservation attribute (i.e. preference) of "Needs Patio".

Now that you know the rules, here's what you can do. You can disable any of the attributes that don't apply to your campground, to shorten the list of options for the operator to choose from. You can also change the text for any of them to make them more applicable, within reason. You should **not** change the Site Type field or Site Class field. Also be aware that if you change the ones that appear in the dialogs separately, like the Site Facing, Pad Width, etc. that appear on the Site Setup dialog, the dialog text for the field name will not change, so it could be confusing. The names and text definitions of the others can be changed as needed.

The **Abbr.** text is used in the Requests column of the tab views.

The **Normal Header** text is used in the Preferences and Attributes dialogs when selecting them.

The **Long Name** text is used in the Quick Info windows for the site and reservation.

The **Description** is not currently used, so you can put notes there.

What you **can't** do is change any of the field types. Therefore you should know the field type before changing what it's used for. There are several fields of each type (size fields, yes/no fields, and ratings fields) so that you should be able to find enough to suit your needs. You could even modify the pick-list fields normally used for Site Facing and Pad Type if you need different pick-list attributes.

Special Case Fields

First Night and Last Night fields -- The Normal Header of these fields is used throughout the program for report header columns and on the receipt forms. While the default is First Night and Last Night, you may change these if needed, for instance to First Day and Last Day.

Program Options

Overview

These settings, found under the Maintenance menu, allow customization of many aspects of the program. These settings are stored in the database so the functionality will be consistent wherever the database is used. If you're using the networking version, these options are global -- all workstations will use the same options, and changes are automatically made on every workstation.

Manager access is required to view or change these options.

Format Options

Confirmation Number Formatting -- This selection allows you to specify how the confirmation number is created from the reservation record ID. You can change these any time, but any reservations made previously will not change -- it will only affect new reservations.

Prefix - Specify a prefix that each confirmation number will start with (you can use letters or numbers or any characters you like). It can be any length.

Minimum digits -- This will be the minimum length of the entire confirmation number, including the prefix. Zeroes will be added between the prefix and the record ID if necessary. The confirmation number will be longer than the minimum if required to include all of the non-zero portion of the record ID. Example: With a prefix of "R102" and a minimum of 8 digits, reservation record ID #00000043 will have a confirmation number of R1020043, while record ID #00087546 will have a confirmation number of R10287546 (9 digits). Also note that if you are using multiple workstations, the unique part of the record ID will be a minimum of 8 digits long (the workstation number is the top two digits of the record ID, like #020001234 for workstation #2), so a minimum of 9 digits should always be used.

Date Format -- There are several date formats to choose from, which will be used most places that a date appears on a report or printed receipt. Selections include several variations of both m/d/y and d/m/y formats, with or without the weekday. Note that the computer's regional settings (for instance U.S. or Canada) will automatically affect the date-picker controls, but will not affect this setting. This setting must be changed manually.

Tabbed list view options (Arrivals, Departures, etc.) -- These options affect the appearance of several of the tab views -- Arrivals, Departures, On Site, Unassigned, Non-Reserved, and Payments Due.

Show a "Total" row -- This enables the extra row at the bottom of the view, showing the total number of entries (reservations, transactions, etc), plus totals for any appropriate columns such as number of adults, extra vehicles, or balance due.

Show reservations not assigned to a site even if a Site Type is selected -- Used for the views that have a Site Type selection (all except the Unassigned and Non-Reserved views). When this is not enabled, the list will show only entries for the specified site type selected in the drop-down list (unless of course All Site Types is selected). When this is enabled, it will show entries for the selected site type plus those for any with unassigned sites. Use this option if you prefer to think in terms of "it might end up as any type, so show it with all types". For example, if you want to show all Arrivals that "are" or "might be" for the selected site type.

Show grid lines by default (must restart to take effect) -- This is the default, so all grid views show the grid lines. If you prefer not to see lines in the grids for a cleaner look, then you can turn this option off. It will not immediately turn grid lines on or off, but will take effect the next time the program is started. You can manually turn off the grid lines on each grid (except the Rack view) using the **Grid Lines** option on the right-click context menu.

Function Options

Customer toolbar icon invokes "Find Customer" instead of "Add New Customer" -- If you find that you often use the Find function after clicking the toolbar to add a new customer (a good practice to avoid duplicates), you can set this option so the Find Customer dialog opens immediately. If the customer is not found, clicking "Cancel / Add New" on the Find dialog will take you back to Add New Customer so it can be added.

"Find Customer" defaults to showing all customers when not starting with a partial name -- If your customer database is small, you may decide that it's easier to just scroll through the complete list of customers rather than having to enter a name first. You can enable this option so that the Find Customer list starts with all customers instead of being blank -- but be aware that this could be slow if your database is large. Only the most important fields are shown initially to make it faster (name, city, state, and notes), but after making any filter changes the fields shown will change according to the filter type. For instance if you do want to see all of the fields for all customers then you can check and then uncheck the Filter By box to refresh the list.

Cash-register toolbar icon invokes "Unbound Transactions" instead of general Transactions -- This is enabled by default so that the cash register icon is just used for counter sales, like a point-of-sale system. If you often need to enter transactions for customers or reservations and prefer the Add a New Transaction dialog (which lets you first search for a customer or reservation), then you can disable this option so the cash register opens the New Transaction dialog without assuming it's an Unbound transaction.

Enable "Day Pass" function when making New Reservations -- When this is enabled, a Day Pass button will appear on the New Reservation entry dialog as long a site has not been selected. This allows making Day Pass "reservations", complete with customer information. If your park does not issue Day Passes or you prefer doing them as Unbound transactions (no customer information), then you should disable this option.

Automatically Find Customer after Last Name is entered on New Reservations -- This enables a quick-find function when entering the customer name when making New Reservations. A small version of the Find Customer dialog will open automatically after the Last Name is entered, allowing quick selection of a previous customer. Without this enabled, the Find Customer button must be used to find existing customers.

Start New Reservations with "Show Available" checked -- This option only affects the "New Reservation" dialog. When set, the "Show Available" option will default to being checked (on) by default in the New Reservation dialog, so only the available sites will be shown.

"Show Available Only" shows open & available sites plus... -- The options in this box allow you to fine-tune what is defined as "available" for the purpose of the "Available Only" check box on the Rack View, as described below...

Off-season and special dates unavailable -- Set this option if you want to consider sites available even if the site's "season dates" or "special unavailable dates" indicate that it shouldn't be available. This might be useful if you have sites that aren't normally used off-season, but you would use if necessary for an extra-large crowd.

Blocked reservation dates -- Set this option to include sites even if the dates are blocked by an existing reservation. Since the purpose of reservation "blocking" is to indicate that the customer might stay longer than his initial reservation but isn't sure, this would let you know that a site might be available if the customer does decide to leave. If that's the only "available" site for a new reservation, you could then ask the current customer to make a decision so you can book the new customer if possible.

Un-Confirmed reservations -- Set this option to show sites with pending reservations as still available unless the reservation is "Confirmed". This is useful if you have a strict confirmation policy, so that you can cancel an unconfirmed reservation if a new customer needs the site and the confirmation is overdue.

Un-Guaranteed reservations -- Similar to Un-Confirmed above, set this to show sites as still being available as long as the customer has not "Guaranteed" a reservation (for instance with a credit card).

Prompt Options

Warn when no site is selected for a new reservation -- When this is set, the user will be warned when making a New Reservation and a site has not been selected. If you commonly make reservations without assigning a site until they arrive, then you may want to turn off this prompt.

Warn when a reservation is made on an "unavailable" date for a site -- Normally, the program will show a warning prompt if a reservation is made that covers a date that is marked as unavailable for the site. You can disable this warning if your reservations commonly cover unavailable dates. One example of this would be making a full month reservation for a site that's normally only available weekends, to avoid making 4 separate weekend reservations.

Ask for confirmations for simple reservation changes and actions -- If you're sure-fingered enough to not require prompts for every right-click action on the Rack, etc., then you can turn off these prompts to save time.

Ask if staying the same number of nights when the start date is changed on the Rack -- This prompt is enabled by default, and will appear any time the start date (First Night) is changed as a result of an action on the Rack. This will apply to changing the start date directly with the Advance Next Reservation and This is New Start Date functions, but can also be as a result of a Check In function if the reservation does not already start today. The prompt will ask if the customer is still staying the same number of nights, and if answered "Yes", it adjusts the ending reservation date automatically. If this is usually the case, it will save the added step of adjusting the end date manually. If this is not often the case, you may choose to disable this prompt.

Open a Transaction dialog when... -- This selection allows you to specify the circumstances in which you want the New Transactions dialog to automatically appear. Your choices here will probably depend on whether you enter charges before a reservation is checked in, and whether you prefer to review charges any time a change is made. Most of these options are self-explanatory, so they won't be detailed here.

One option of special mention is the **... and automatically go to "Select Rates"** option for checking in. When enabled, this will typically save one additional step when checking in reservations by immediately prompting for the rate selection. If you don't normally use Select Rates when checking in a reservation (for instance if you add the charges ahead of time), then you may disable this option.

Prompt for details when entering transactions (instead of entering them in the grid) -- This option enables a whole set of transaction-entry dialogs. The "old" method was to enter transaction details (qty, description, amount, etc.) directly in the transaction grid. These new entry dialogs are more user-friendly and allow entry of more details. However they do typically require an extra click or key press. If you just prefer the old way of entering the details in the grid, you can disable these new dialogs.

Monthlies Options

These options make it easy to automatically set the length of monthly (extended-stay) reservations, and the amount initially charged. They only affect reservations with the Extended Stay flag set.

There are 3 different settings allowing automatic date setting, based on the start date of the reservation, to a specified number of months, or to the end the month any number of months away, or the end of a year. These automatic settings can also be disabled by selecting the "none" options.

Automatically extend reservation -- This setting determines the automatic Last Night of a new reservation when the Extended-Stay flag is set on the New Reservation dialog, if (and only if) the reservation's Last Night has not yet been selected manually or by entering a number of nights. For instance to make all extended-stay reservations for at least 5 months, select "by exactly one month", and enter 4 in "and then add another ___ months".

Also Block the site for the reservation -- This works similar to the setting above, but instead of setting the Last Night, it sets the Block date. For instance, you may want to make the actual reservation for only a few months, but keep the site blocked for several years.

Limit the initial number of days charged to -- This is used when selecting rates for an extended-stay reservation. This is normally only the initial charges, since the Monthly Billing will likely be used for subsequent months. Only a few options are available here -- charge for exactly one month, to the end of the month, or to the end of next month. This setting will depend on whether you force billings on the first of the month, and whether you require at least a month's rent up front.

The combination of these settings depends partially on your monthly billing procedures (exact-month or end-of-month), but in general there are a couple different recommended ways of doing monthly reservations.

One way is to only "reserve" the site for one month at a time, but block it initially for an extended period (this can be several years if you like, or just a few months, depending on the typical length of stay). Then when monthly billing is done, extend each reservation by an additional month (this is a one-click function on the Monthly Billing dialog). This may work best if your monthlies are typically short-term (less than a year), and are billed on their month-anniversary date instead of the first day of the month.

Another good way is to go ahead and make the reservation extend out to the end of next year. Then at the end of this year, when you do the monthly billing go ahead and extend them all another year (keeping the site reserved for at least 1 year in advance). This works best for billing on the 1st of each month (presumably the first partial month is pro-rated), where your tenants are likely to stay at least a year at a time.

Database Options

This portion of the Program Options dialog will only be available if you're logged in with an Administrator access level.

Automatically save the database after each action -- This option is enabled by default, so that the database is saved to the computer's hard disk after every action -- for instance, after every new reservation, check-in, transaction, or anything else that changes the database. Note that it's saved after every main dialog is closed, not while working in the dialog. While it's preferred to leave this enabled to avoid data loss in the case of a malfunction or power loss, you may need to turn it off if it causes a noticeable delay due to a slow computer or large database. You may also wish to disable this option if you are experimenting or making changes that you're not sure you want to keep, so you could reload the previous database without saving the new changes.

Compress the database backups to a ZIP file -- This option is enabled by default, so database backups take less space on a floppy disk. This results in the backup database being compressed using the common ZIP file format, which will take one fourth the disk space or less. (Don't confuse this with ZIP brand disks by Iomega.) This also allows the backup to be made to multiple disks if it's too large to fit on one disk (disk spanning is only possible with this option enabled). The built-in Restore function can read these ZIP files directly, and any commercial file compression utility, such as WinZIP, can extract the database from the ZIP file. While there is no real advantage to turning this option off, there may be rare cases where a ZIP file cannot be created (usually due to a Windows configuration problem, an error message appears when making a backup in this case), so you can turn this off if needed.

History logging enabled -- This option is enabled by default, and makes the program write out a log of every change made to the database. This is required for proper functioning if you are networking multiple computers, and can also be helpful if you aren't using the auto-save option above (to restore changes lost due to a power outage, for instance). If you are not using networking and you do enable the auto-save function, then history logging is not necessary, but it could still be helpful for tracking down problems (for instance, to determine if a reservation was deleted by accident). While the log is in text format, it's not necessarily easy to interpret without some technical knowledge. Contact Cottonwood Software if assistance is needed.

Lock/Unlock logging enabled -- This is not required for any functionality and is only useful for diagnosing network problems. Since it increases log size and delays, it should not normally be enabled.

Check history logs for unsaved changes after loading the database -- This option can be used to automatically restore changes "lost" due to computer crashes or power outages. (However it can also cause a significant delay when starting the program, so you may want to only use it in emergency cases.) This will check to see if any changes have been logged (assuming history logging was enabled) since the database file was saved. If it detects that some unsaved changes exist, you will be prompted to re-apply them. This can be extremely helpful in the event that you must restore the database from a backup after a computer crash -- assuming the log files are intact, it will be able to automatically re-apply all changes made since the backup was made.

Automatically delete logs after ... days (0 to 999 days) -- Depending on your disk space, you may want to have the program automatically delete the oldest history logs automatically. The size of the log files depends on the amount of activity each day, but generally a 30-day history is only a few megabytes. You should keep at least 7 days of logs available in case a restore is needed. You can set this value to 0 to completely disable log deletion

Network Functions

Overview

This Network section only applies if you have purchased a license for networking more than one workstation. You can use the [View | Product Authorizations](#) function to see how many workstations your license authorizes you to network. If the number is 1, then you are not authorized for networking.

Network setup parameters and options can be found under [Maintenance | Network Functions | Network Setup](#), while some diagnostic and administrative functions can be found under [Maintenance | Network Functions](#). These are explained in more detail below.

Networking allows Campground Master to run on 2 or more connected computers (workstations). While you can install and run Campground Master on a network (or even on more than one computer) without a networking license, you cannot access the same database at the same time without losing data. The networking functionality is required for the different workstations to communicate their changes to each other and stay synchronized.

Note that the sample database ("demo") is not authorized for networking, thus it is safe to load at any workstation and will not affect others. If you are evaluating the software or want to try the networking before purchasing the upgrade, you may request a free 30-day trial license enabled for networking.

Setting up for a Network

Setting up Campground Master for networking is very simple, as long as your network meets the requirements. Network setup parameters and options can be found in the menu: [Maintenance | Network Functions | Network Setup](#).

Requirements:

- TCP/IP network -- the workstations must be connected via TCP/IP (which can also be through the Internet)
- Winsock 2 -- the system must support Winsock 2, which has been part of Windows since Windows 98. If you are running Windows 95, you may need to install Winsock 2 in order for the program to run (you will get an error message when starting the program if Winsock 2 is not installed). This can be downloaded from the following Microsoft web site:
http://www.microsoft.com/windows95/downloads/contents/wuadmintools/s_wunetworkingtools/w95sockets2/default.asp
- A known IP address for the master workstation -- The master workstation must have a known IP address that can be accessed by the other workstations. If you will be using the internet, this should be a static IP address visible to the internet (to avoid setup changes every time you connect).
- An unblocked port -- you can use any TCP/IP port number you wish, just make sure it's not blocked by any firewall or routers in the system. We recommend a port in the 6000-12000 range, to minimize the potential conflicts with other software.

Master (Server) workstation:

You don't need a separate computer for a server. Any of the workstations can be used as the "master" workstation. This workstation will automatically operate as the Server for the Campground Master network, and all other workstations will operate as Clients. (Internally, they actually run different code depending on whether they are a server or a client.)

Since the master workstation will not have to request locks from other workstations and will operate "offline" automatically if the other workstations are disconnected, you may want the most-used workstation to be the master. It should also be the fastest computer, since it has to do more work (routing all of the changes from each workstation to all other workstations).

Alternatively, you may decide that the master should be a "protected" computer separate from the reservation center, since it's the most important computer to keep running and should have the most reliable network connection. The decision will depend on your environment and whether speed is an issue. Since the master designation can be changed any time through the settings, you can always change it later.

Except for a few maintenance functions that can only be done on the master workstation, all workstations have equal abilities. Only the master workstation can perform the [New database](#) function and edit [Field Definitions](#). Also, while any workstation can edit [Raw Data Tables](#) and [Pick Lists](#), these should be done on the master workstation whenever possible due to the number of records that need to be locked.

Setup Procedure:

1. Install the Campground Master software on each workstation, and decide which one will be the master.
2. After you have a database set up and authorization code entered on the master, make sure the database is authorized for networking. This can be checked through the [View](#) | [View Product Authorizations](#) function -- the "Max Workstations" value will be greater than 1 if you are authorized for networking.
3. To make sure that the printer options, tab view options and other settings will be the same on each workstation (especially if you have already been using the program on a single computer for awhile), synchronize the settings for all workstations. This can be done at any time, but doing it before you copy the database to the other workstations will ensure they are set up correctly to begin with. Note that this is essentially a database function and does not require the other workstations to be connected yet -- it simply copies the master's settings to the other workstation's settings in the database. This function is under [Maintenance](#) | [Network Functions](#) | [Synchronize local options to other workstations](#).
4. Copy the database to each workstation. This can be done using the Backup and Restore functions built into the software, or by manually copying the database file. Do NOT open the database file through the network! If more than one workstation is accessing the same database file, the data will become corrupt. Each workstation should be opening the database from its local hard drive. It's also important that the database have the same name on every workstation. To make sure these conditions are met, use the [File](#) | [Save As](#) command after loading or restoring the database, select a location on the local hard drive, and enter (or select) the file name you're using for the database.
5. Find the IP address(es) of the master workstation. If you don't know its IP address, you can use the [Show IP address\(es\)](#) function under [Maintenance](#) | [Network Functions](#). If it shows more than one address, you will need to figure out which one is for the local network and will be visible to the other workstations. Local network IP addresses often start with 192. The **IPCONFIG** command from a Command Prompt (DOS window) can also indicate the local area network's IP address in Windows NT/2000/XP. In Windows 95, 98, or ME, run the **Winipcfg** program from Start / Run.
6. Decide on a TCP/IP port number. You can use the arbitrary default port (6010), or if that is known to conflict with other software you can change it.

7. On the master workstation, open the database and make sure the Network settings ([Maintenance | Network Functions | Network Setup](#)) are set accordingly: The workstation ID should be 0, and the Master ID should be 0. (The master ID can be another number, but this is the easiest way to keep track of it.) The other options are covered later, but all of the check boxes should be checked..
8. On each of the other workstations, open the database (if not already open) and change the network settings accordingly: The workstation ID should be different for each one (1, 2, 3, etc.), the Master ID should be 0, and the Master IP address should be the address from step 5. Note that you may need to use a different master IP address on different workstations, depending on your network setup (use the address visible to that workstation -- for instance the workstations on the LAN may see a different address than a workstation connected through the Internet).

You can also specify various heartbeat frequency, timeout, and other options if you prefer. See the *Network Setup Dialog* section for more details.

If the master workstation is running at the time you perform step 6 for each workstation, you should see it immediately connect after you change the settings and click OK. You're done!

If a connection error is shown, double-check your network settings and refer to the following sections, or contact us for support. If you are running a firewall, try disabling the firewall -- if connection is successful with the firewall disabled, you will need to determine how to enable the selected port for the firewall (consult the documentation for the firewall).

Network Setup Dialog

This function under [Maintenance | Network Functions](#) will only be available if you are authorized for networking (more than one workstation), and you're logged in with an Administrator access level. Note that these options are stored in the file **Campground Master.ini**, so they must be set up separately for each workstation.

The descriptions here give basic information about the options -- for complete information on network functions and options, refer to the other Network Functions sections.

Connection

Maximum number of workstations authorized -- This value is determined by your authorization (the number of workstations for which you purchased a license. It is not editable.

This Workstation's ID -- Each workstation must have a unique numeric ID, which starts at 0. So for instance in a 5-workstation system, this number will be in the range 0 to 4. The workstation ID will be shown in the caption bar for easy reference.

Nickname -- You can give a workstation a nickname, which will show in the caption bar and is also used in diagnostic messages. This is optional, so you can leave this field blank. The nickname will also be shown in the caption bar.

Master (server) workstation ID -- One and only one workstation is designated as the master, and will be running the server side of the network. This is usually the workstation with the ID of "0", but may be changed if necessary. It's critical that this is the correct ID -- it must be the ID of the workstation at the given IP address!

Master IP address -- This is the IP address of the master workstation (server). This value is not used on the master itself, but all other workstations must have this set properly.

TCP/IP port -- This is the port number used for communicating. All workstations must use the same port number. A number above 6000 is recommended to reduce the change of conflicting with other communications software.

Show "Connecting" progress window -- When this is enabled, a window will automatically open any time the a workstation (excluding the master) is attempting to make connection with the server. This should be left on to server as an indication whenever the connection is lost. (The window will automatically close 5 seconds after a connection is made.) However if the network is unstable and workstations require reconnecting often, this window may be disabled to reduce the annoyance.

Request a database update every time connected -- This can be a dangerous option, so be sure you understand it before using it! When this is enabled for a client, it will request the full database from the server every time it reconnects. This can be useful for seldom-connected workstations, since it may be quicker to get the whole database than to get all of the changes since last connected. However, this also means that any changes made on this client while offline will **not** be sent to the master and will be lost. So only use this option if you know that the client never is used offline to make changes.

Timing

Time-out for requests (3 to 300 seconds) -- Enter the number of seconds to wait for a response from the server when communicating (requesting a record lock or sending changes). Typically this should be about 3 to 5 seconds, but for slow (internet) connections you may raise this. It may also need to be raised if you're running a large number of very active workstations.

Remote update refresh delay (0 to 300 seconds) -- This determines how long to wait before the program is considered "idle" and can refresh the screen when an update comes in from another workstation. It does not mean that the data update itself is delayed. The purpose of having a refresh delay is so that the screen doesn't refresh frequently when you're trying to look at something or click on a function. Any time the mouse is moved or clicked, the program is considered "active" and screen refreshes from other workstations will be delayed until activity stops for the indicated number of seconds. If you open and close a dialog or change tab views, the screen will refresh immediately, so an easy way to force an immediate refresh is to click on another tab view and then click back, or to press **F9** for the Search function and then **Esc** to close it.

"Heartbeat" frequency (3 to 300 seconds) -- This time determines how often an "alive" message is sent to the server (or to other workstations from the server). This must be at least 3 seconds to avoid networking bottlenecks. This frequency also determines how often a workstation will check to see if it has been disconnected and will attempt to reconnect automatically (if the auto-start function is enabled). If all workstations are idle, this also serves to keep communications happening on the network, and will affect how frequently the network status indicator changes on the status bar.

Diagnostic Options

Networking Enabled -- Unchecking this option will completely disable all network functions.

Auto-start Networking on program startup (and reconnect if disconnected) -- This should be left enabled for normal operations, but may be disabled to avoid repeated connection attempts for workstations known to be disconnected from the network.

Force Autosave of the database -- The auto-save function under Database options should be enabled, but just in case it's disabled by accident, this function will make sure the database is still saved after every operation. While it's recommended that the database should always be auto-saved after every change, this can cause delays in very active network environments or for very large databases.

Connecting Progress Dialog

Non-master workstations will display this dialog any time a connection to the master is being made or is terminated (either upon starting up, whenever the connection is lost, or if a connection is manually initiated through the network functions). If this becomes an annoyance rather than a benefit, it can be disabled through [Maintenance | Network Functions | Network Setup](#).

During normal startup, assuming the auto-start network option is enabled, this dialog will appear to show the progress. Once a connection is made, the dialog will close automatically after 5 seconds (you will see the countdown). You can also close it immediately by clicking the Close button. Note that this will *not* close the connection, just the dialog!

If a disconnect or network error is detected, for instance due to network errors or if the master workstation is shut down, the Connection dialog will automatically appear to show that it has been disconnected. If a connection is not in progress or already established, the "Connect to Server" button will be enabled. You can click this to attempt a connection any time. However if auto-start is enabled, it may automatically start reconnecting immediately, or after the "heartbeat" time. Once it's connected you can again wait for the 5 second timeout or close it at any time (even if it's not finished connecting -- it will continue even with the dialog closed).

If a connection cannot be made, the dialog will show an error after a few seconds. Again, you can either wait for the heartbeat to reconnect automatically, click Connect to reconnect immediately, or Close the dialog and let it work on its own.

If your workstation is disconnected and auto-start is not enabled, you can use the [Connect to Server](#) function under [Maintenance | Network Functions](#) to initiate a connection (which will also show Connecting dialog).

Other Network Functions

There are several functions under [Maintenance | Network Functions](#) that can be used when diagnosing network problems or for maintenance. These are only available for operators with Administrator access.

Network Setup... -- This opens the Network Setup Dialog for setting various network options.

Synchronize local options to all workstations -- This is used to copy this workstation's "local" settings to all other workstations. This will copy this workstation's settings to all other workstations' settings in the database, and of course send the changes to each workstation. It can be done on the master even if the other workstations aren't connected -- the changes will be synchronized just like other database changes when the workstation is reconnected. Use this with care if there is any reason that other workstations might require different settings. The local settings include: Printer Options, all tab view options (from their Option buttons), tab view default site filters, and default settings for Reports (meter lists, occupancy report, etc.).

View Network Diagnostics Window -- This will open either the Net Client or Net Server diagnostics window (depending on whether this is the master workstation or not). Unlike most other dialogs in Campground Master, this diagnostics window can be left open while you work. Actually, the window always exists and is functioning (recording messages), it's just hidden unless you view it.

Show IP address(es) for this workstation -- This is just a utility function for determining the IP address of the master workstation, and will show all known IP addresses for this computer. This may be a single address or multiple addresses, depending on your network setup (e.g. one address may be visible to the internet and another visible to the LAN).

Connect to Server -- For non-master workstations, this will initiate a connection if it's not already connected to the master. A Connecting Progress Dialog will be shown (if it's not disabled in [Maintenance | Network Functions | Network Setup](#)).

Disconnect from Server -- For non-master workstations, this will immediately disconnect from the master. If you have the auto-start option enabled, you will be given an option to disable this option so it will stay offline (until the next connection is made manually).

Work Offline -- If this is a non-master workstation, you must specifically select this function to enable offline changes. You must also first Disconnect from Server if not already disconnected. Once working offline, changes can be made at will. They will be logged, so that when you reconnect to the server, the changes will be transmitted to the server to synchronize the database.

However, working offline is **not completely safe!** Even though it will synchronize the changes, there are limits to what can be synchronized. For instance, since locks cannot be acquired for changes, it's possible that a change you make will conflict with a change made by another operator. The results of this are unpredictable -- either change may take precedence depending on internal circumstances, but usually the earlier change will be kept because by the time your change arrives, the value has been changed already. Previous values are compared as an integrity check, so if the value is different than your previous value, your change will be ignored. Obviously it's also possible that a record has already been deleted before your changes are received (though this is rare). In general, record additions are safe because each workstation uses unique record ID's, and changes to different customers or reservations will be safe. However, be sure to avoid making any changes (including adding transactions) to the same customer or reservation on different workstations.

Force view to rebuild/refresh -- If all goes well you should never need to use this function, since the views (Rack, Arrivals, etc) should update automatically whenever a change occurs on any workstation. However if a change doesn't seem to be showing up on the Rack or other tab view, try using this function. This will rebuild some internal indices and refresh the view to make sure that it shows all reservations properly. If it still doesn't seem to be correct, then you may need to request a total database refresh.

Request a total database refresh -- A non-master workstation can request that the entire database be refreshed. This might be needed if log files become corrupt preventing resynchronization, or if the workstation has been offline so long that logs no longer contain all of the changes needed. (Generally these are detected automatically and a full refresh will be done as needed -- however this function is provided just in case things don't seem to be synchronizing correctly.) Note that this can cause significant delays at the master as well as this workstation while the database is being transmitted, so use only when workstation activity is minimal.

Start Server (allow connections) -- if the server has not been started, use this function to start the server (master workstation only).

Stop Server (work offline) -- This function for master workstations is similar to the Work Offline function, but in this case it will stop the server completely so all workstations will be disconnected.

Clear all record locks -- This master workstation function will immediately clear all record locks for **all workstations**. This can be useful if a workstation becomes disconnected before releasing its locks (during editing), and a record it had locked needs to be edited by another workstation. However, you should make sure that all other workstations are in an idle state (no dialogs are open) when you do this, otherwise it could unlock records that really should still be locked. An alternative would be to stop the server before clearing locks. When you restart the server, all workstations will re-request locks for records currently being edited. Likewise, any time the software is closed, all locks are automatically removed.

Net Client Diagnostics Dialog

This dialog can be opened on non-master workstations to view the activity on the network and perform a couple diagnostic functions. This dialog may be left open while working in the program (though it will stay on top unless it's minimized), or closed/hidden at any time.

This function is available only to operators with Administrator access, and is available through [Maintenance | Network Functions | View Network Diagnostics Window](#).

Network settings are shown for reference -- to change them, you must use the [Maintenance | Network Functions | Network Setup](#) function.

The large window will show status messages, indicating messages received and sent by this workstation. It will not show activity from any other workstation. In general, this can be used to see if it's getting and sending "Alive" messages, see the results of record lock requests, changes sent and received, and error messages. Sequence numbers are shown where appropriate, for comparison to logs if needed.

If you want to see the Alive messages, you must check the "Include details" box. (Unchecking this will help minimize the messages shown and allow easier inspection of the messages.) Also, when details are included you will see the details of every change transmitted or received, in the same format as the log.

By default the message window will hold 100 lines. You can increase this if necessary, however this can dramatically affect the speed and possibly cause networking problems due to extra delays (up to about 1000 lines should be tolerable without problems). Note that the number of lines will still be saved even if the window is closed / hidden (so the messages are still there when it's opened again. However, once the program is closed it will revert to 100 lines to avoid adverse effects.

To verify that things are connected properly, you can Ping the server or Send a test message. Just click the Ping button to verify the connection and to see how fast it responds. You will see a response with a number of milliseconds. Anything under 100 ms is good for a LAN, and anything under 500 ms is good for an internet connection.

If you send a test message, it will go to the server and then be re-broadcast to all other workstations, and will appear in their network diagnostic windows.

Net Server Diagnostics Dialog

This dialog can be opened on master workstations to view the activity on the network and perform a couple diagnostic functions. This dialog may be left open while working in the program (though it will stay on top unless it's minimized), or closed/hidden at any time.

This function is available only to operators with Administrator access, and is available through [Maintenance | Network Functions | View Network Diagnostics Window](#).

Most of the functions are the same as the Net Client Diagnostics Dialog, but the server has a few additional functions.

The server diagnostics will show each of the workstations connected (by nickname if they have nicknames set up). You can Ping them all at once or individually, or forcefully disconnect one or all of them. (Remember that they will automatically attempt to reconnect if they have the auto-start network option enabled.) To completely disconnect and not allow reconnection, click the Stop button to stop the server.

If you see a Start button instead of Stop, that means the server is currently stopped. The server will not automatically restart (even if auto-start is enabled) if you stop it manually. To restart the server and wait for client connections, click the Start button.

How Networking Works

This section describes in detail how the real-time networking functionality in Campground Master works. It may be helpful to understand what's going on behind the scenes, to get a better idea of why some things work the way they do.

Real-time Networking

Each workstation will have its own copy of the database, both on the hard disk and in RAM memory. This allows each workstation to operate quickly and independently when viewing data, running reports, etc. This also allows workstations to be operated offline if necessary -- though not recommended in general, this allows operation even if the network is down, or for instance if you want to do some reports offline. Note that non-master workstations can only work offline if the Work Offline function is specifically selected (administrator access is required for this).

Unlike most networked database applications, Campground Master operates as a real-time system. When changes are made at one workstation (reservations added, dates changed, etc.), those changes will be immediately sent to all other workstations so that they will be up to date. If the changes affect the current tab view, the screen will be updated immediately to reflect the changes, just as if they were done at each workstation (subject to a refresh delay setting, which can be used to prevent numerous screen refreshes when the workstation is in use).

Naturally it's important to keep changes synchronized and to prevent two workstations from making different changes to the same information at the same time. This is achieved through three mechanisms -- record locks, sequence numbers, and logs.

Record Locks

Before any changes can be made to a record in the database, it must be "locked" by the workstation. All locks are requested through the master workstation (which also acts as the network server). If a record is already locked by another workstation, then the lock request will be denied, and the operator at that workstation will be informed that it can't be edited. If the lock is granted, then editing proceeds normally. For the most part this is transparent to the operator as long as there is no conflicting locks, except for a small delay when requesting the lock (e.g. before the editing dialog is opened).

Once the editing is complete, the changes are sent to the master workstation for distribution to the other workstations, and the locks are released so other workstations can edit the record if needed. If a workstation gets disconnected or goes down while it has records locked, these locks will be "stuck" in the master workstation -- but they will be cleared automatically when the workstation comes back online, or they can be manually cleared at the master workstation by an administrator function.

Sequence Numbers

Whenever changes are made, they are tagged with a sequence number and logged, as well as sent to the master workstation. If changes are missed for any reason, the gap in sequence numbers will be detected. The master workstation will request any missed changes from a workstation and will make sure they are applied in the correct order. Likewise, the master makes sure that a workstation is up to date before allowing it to lock any record, so that data integrity is maintained. Sequence numbers are checked often (along with the "heartbeat"), so a change missed due to network problems (extremely rare, but possible) will be quickly detected and corrected.

The other benefit of logging changes with sequence numbers is that it can allow automatic synchronization after a workstation has been offline. For instance, if you could call in to your network via the internet from home, all changes since the last time your home workstation was connected will be synchronized automatically. Likewise, you could work offline (preferably after getting synchronized), then call in to the network -- all of your changes will be downloaded to the master and the database will be synchronized.

If a workstation cannot be synchronized for any reason, there is a fail-safe mechanism -- the entire database can be transferred from the master to a workstation. This will be done automatically if the master can't find all of the changes needed by a workstation (e.g. if the log file becomes corrupt due to a computer crash), or it can be done manually any time if the workstation doesn't seem to have the correct data. Note that this can only be done **from** the master workstation -- if a client workstation, rather than the master workstation, is determined to have the only "good" copy of the database, then it must be transferred manually to the master and then synchronized to the other clients.

Logs

Sequence numbers indicate when changes are missed, but in order for a workstation to "catch up" on missed changes, they must be logged so that they can be retrieved. Each workstation maintains log files of all changes, both for its own workstation and for all other workstations. Thus if changes are requested for a specific range of sequence numbers, it can read them from the log and send them to the requesting workstation. If the log entries for the requested sequence numbers can't be found, the only recourse is to refresh the entire database -- this will be done automatically when needed, but can cause a significant delay. Therefore make sure that history logging is enabled and that disk space doesn't run out.

A new log file will be started each day, and named according to the database name, date, and workstation ID. Log files are automatically deleted after a specified number of days to keep disk space to a minimum, but you should keep logs for at least 7 days if possible. Another reason to keep logs for a longer period is that they can serve as a complete audit trail. Every single change to the database is recorded, and every entry has the date, time, and operator responsible for the change. The logs are in tab-delimited text format, so they can be examined if necessary (some knowledge of the database structure is required). In addition, network problems could be diagnosed by comparing the logs of different workstations.

You can optionally log record locks and unlocks as well as the changes. While this is not required for any functionality (and in fact will make other functions slower and use more disk space), it can be useful for diagnostic purposes if a software bug is suspected. In general, you can leave this option turned off.

Finally, one great side-benefit of the logs is the ability to completely recover after a crash, even if the crash destroys the database. As long as the log files are intact (for at least one workstation), you can restore from a previous backup and have Campground Master automatically re-apply all changes made since the backup was made.

Deposit Balance Adjustment

This Administrator-only function is used to enter a manual adjustment to the overall Deposits balance. This balance is a running total of the amount of advance deposits received from customers than have not yet been "used", or applied toward reservation charges.

The dialog will show the current all-time totals for deposits received, deposits applied, any previous adjustments, and the current balance. When making an adjustment, you can either enter the adjustment amount (the new balance will change accordingly), or you can enter the new balance if you know it (the adjustment required will be calculated accordingly).

Either way, just click Save when finished, and the adjustment will be added as a new unbound transaction. As with other transactions, this adjustment will be tagged with the time, date, and operator. You can see the adjustment on the Transactions reports (tab view).

If you make a mistake you can either enter a new adjustment, or you can edit the transaction through the Transaction tab view (right-click on it, select Transactions).

A/R Balance Adjustment

This Administrator-only function is used to enter a manual adjustment to the overall Accounts Receivable balance. This balance is a running total of the amount of charges to customers than have not yet been paid.

The dialog will show the current all-time totals for charges (including taxes & discounts), payments received (reduced by refunds/credits), deposits applied, any previous A/R adjustments, and the current balance. When making an adjustment, you can either enter the adjustment amount (the new balance will change accordingly), or you can enter the new balance if you know it (the adjustment required will be calculated accordingly).

Either way, just click Save when finished, and the adjustment will be added as a new unbound transaction. As with other transactions, this adjustment will be tagged with the time, date, and operator. You can see the adjustment on the Transactions reports (tab view).

If you make a mistake you can either enter a new adjustment, or you can edit the transaction through the Transaction tab view (right-click on it, select Transactions).

New Database (clear all)

This will close the current database and initialize the software for creating a new database. Administrator access is required to use this function, as it is usually only done once when creating the campground database and never done again.

All of the data tables will be emptied, default fields will be enabled, and default pick lists will be set up. The operator list will also be reset to having one Administrator operator, which will be logged in automatically. The database name will also be cleared, indicated by **<UNTITLED>** in the caption bar.

Using New Database is not terribly dangerous because it's not easy to write this new database over your old one (you would have to select the name of the old one manually), but it's not something that should be done without a good reason.

Once the new database is created, you must save it to a new name and location using the File | Save As function. Until you do this, changes will not be saved even if the Auto-save option is enabled, because the database has not yet been named. Once you have given it a name with Save As, the auto-save will function normally.

Purge Old Data

This function allows purging of transactions and reservations prior to a given date, to decrease database size and speed up reporting functions. If your computer does not have a lot of memory or your database gets very large, you may find that the functions slow down significantly after awhile. This means that the database is too large for your RAM and must be used from disk, which is thousands of times slower. This is the reason we suggest 512MB or RAM for extended use -- for most parks this will be enough to hold many years of data without the need to purge.

The Purge dialog consists of a prior-to date, several options that determine what type of data is purged, and a file name for doing an automatic backup of the data before purging. Be aware that the purge operation cannot be cancelled once the "Purge" button is pressed, and cannot be undone except by reloading a backup!

Purge data prior to:

This date designates the age of the data to be purged (and what will remain "live"). It defaults to the beginning of "last year", which could actually be anywhere from one year ago to almost 2 years ago. We recommend keeping at least 1 full year of data if possible for reporting reasons. If this is not possible, you can adjust the date as needed. If you have several years of data then you can also elect to purge farther back, keeping more data "live".

One thing to note about the date is how it's used when purging -- when purging reservation transactions (and/or the reservations themselves), they will only be purged for reservations that ended prior to the given date. Therefore any reservations ending after that date will retain its complete history, even if some of the transactions happened prior to the date. However, customer transactions and unbound transactions will be purged as long as the transaction happened before that date. (Therefore a customer might have some of its transactions purged, but not others that were for a reservation ending more recently.)

Backup prior to purging:

Unless you clear out this field, a backup will be made prior to the purge function. We recommend that you **also** do a manual backup, just in case this file cannot be written for some reason. By default, it will put the backup in the same folder as your current database, and will use the same name with "backup as of yyyy-mm-dd" appended to it. Once the purge is done, you can reload that file at a later time to access the historical (purged) data. It's important to note that the backup file will be the complete database as of the time you perform the purge, rather than *just* the purged data.

IMPORTANT: If you do multiple purge operations on the same day (for instance with different options), the default file name will be used each time -- this will overwrite the original backup with the "newer" database, so the original purged data will be lost! Be sure to double-check the file name and change it if necessary to avoid overwriting an existing backup. You will be warned that the file already exists and can cancel the operation, but you need to be aware of why it's important to not overwrite it.

What will be purged

You can purge transactions, reservations, and customers.

Generally you will **not** want to purge customers, since that's your core customer database. In extreme memory conditions you may elect to purge the ones that have not been used for a long time, but otherwise it's not recommended.

Transactions primarily dictate what can be purged. Only transactions that "balance" will be purged (i.e. no balance is due for the reservation or customer), and the associated reservation or customer can only be purged if all of its transactions are purged. Therefore any old reservations or customers with outstanding balances (usually due to forgetting to enter a payment) will remain forever unless they are manually "cleaned up". The Payments Due tab report can be used for finding unbalanced reservations and customers.

You can choose which transactions are purged -- unbound, customer, or reservation transactions. For instance, you may decide to only purge unbound transactions (generally counter sales) and leave any bound to customers and reservations for historical purposes. Or you can purge customer-only transactions (also usually counter sales), or all reservation transactions.

In addition to the transactions, you can purge the actual reservations that ended prior to the date. Again, this will only be done if the reservation "balances". Any transactions for the reservation will be purge automatically, whether you selected the option to purge reservation transactions separately or not.

Finally, customers who don't have any reservations or transactions can also be purged if desired, to help clean out old customers who don't return often. This is done **after** any other selected purgings above, so if all of its transactions and reservations are purged now, then it will also be purged now. There is also an option to only purge customers that have "never" had any transactions or reservations. If this is selected, it will check the "prior" transaction and reservation figures (explained below), and keep the customer if it has any history -- therefore, even if the customer's transactions and reservations are purged, it will be kept because it had history prior to the purge. This can be useful for cleaning out customers who were entered or imported from an old database but never returned since the software has been in use.

When all of the options are set the way you want, and you're sure you have a backup, you can click the "Purge!" button. The purge should only take a few seconds, and a dialog will show how many records of each type were purged.

Keeping prior totals

Although the records are purged, a few "prior" balances are maintained for historical purposes.

When transactions are purged for reservations or customers, the total amount of payments made in those transactions will be saved (as a single value) and will show up on the Transactions History. This is also added to any total from prior purges. Thus you can still get an idea of how much revenue each customer/reservation has been responsible for.

When reservations are purged, their customers will retain a running total of the number of days-stayed and number of reservations purged. This will show on the Reservation History dialog as a quick reference to show how much business they did in the past that's not still "live".

Keeping balances

Deposit and Accounts Receivable balances (if you use them) are maintained by making "Adjustment" transaction entries automatically. Generally this is only necessary when purging Unbound transactions, which don't have to balance to be purged, since the net balance for purged reservation and customer transactions should be zero. The "Operator" name for these adjustments will indicate that it's an automatic adjustment due to a purge.

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