Campground Master

Hercules Integration

and Operation

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1   Online Reservations

Hercules (2-way integration)

Overview

Campground Master's 2-way real-time integration with Hercules offers the most robust online integration available of any system. It offers the best of both worlds -- a first class front office system that you have full control over, coupled with an industry leading online reservation system that seamlessly melds into your web site.

"**2-way**" means that reservation and availability information flows both ways -- reservations made online are imported to Campground Master without any re-typing necessary, and reservations made locally (as well as other site availability changes) are uploaded to the online system. This means that both systems will be in sync without any effort on your part.

"**Real-time**" means that the synchronization happens continuously and automatically. Most importantly, it means that you can offer your entire inventory of sites to online reservations without worrying about conflicts between online and local reservations. You may never have go online to adjust your site availability, since it's all done automatically. You can even specify certain dates that each site should not be available online, e.g. for special events you know will be full well in advance, all within Campground Master.

Getting Signed Up

Hercules is an online reservation system offered by Leisure Interactive (formerly Friend Communications). Before you can use Campground Master to integrate with their online system, you need to sign up for their service and get it set up. For more information, visit our web site: http://campgroundmaster.com/online.html.

Site Locking

No matter how "fast" a real-time system is, it can't avoid conflicts without "locking" sites before using them, to ensure that the other side can't start a reservation on the same site you're working on. This is accomplished with Hercules the same way it's done with the Campground Master local networking functionality, with one exception -- because the response from the internet may take a little longer, Campground Master doesn't have to wait for the response before letting you continue your work. Instead, it will check to see what the lock response was when you're at a point where any potential conflict needs to be avoided (e.g. saving the new reservation). If there is a potential conflict with someone making a reservation online (typically a rare occurrence), then it will warn you (and/or prevent continuing, depending on the operator's access level).

Likewise, whenever a site is being used locally for a reservation, Hercules will know about it and will prevent anyone from selecting that site for an online reservation.

Automatic vs Manual

Normally the fully automatic mode should be used, since this is the only way to prevent conflicts 100% of the time. However if you're having trouble with internet connectivity then there is the option to fall back into manual mode for uploading and/or downloading. Site locking can also be skipped, and uploading and downloading reservation changes will not take place until you request it. You can get them synchronized any time, through Reservations / Retrieve Online Reservations, but keep in mind that conflicts could arise during the time that the data has not been synchronized.

Hercules 2-way Setup

Overview & Check list

There are several things that need to be set up before the 2-way integration is ready to use. For the most part it's easily done, and the checklist below along with detailed information on each part should guide you through it pretty quickly.

Here's a summary and checklist of the setup procedure. See the following sections for details on each step:

Preparation:

- Get a Hercules account prepared (through Leisure Interactive, see http://www.leisureholding.com/), and make sure they set it up for the "2-way" interface with Campground Master. Once you have the account set up, you will need your Customer # (also known as your customer "Record #") and have Hercules set up a Password for the 2-way interface (this is different than the web site login). There are also some other things you will need to know for configuration later, such as the Space Numbers (which ideally you will have them set up to match your site Abbreviations), Adder ID's, and Discount ID's.

- If you want to use a separate Payment Method for the deposit made online, add that through Maintenance / Pick Lists / Payment Methods.

- If you want to use a separate Reservation Type for the reservations made online, add that through Maintenance / Pick Lists / Reservation Types. Typically this isn't necessary (you can just use the default "Normal" type), but it's an option if you want the online reservations to have a separate type for reporting, rates calculation, or other reasons. If necessary, you can define 2 types for online reservations -- one for reservations longer than a certain number of days (e.g. Weekly or Monthly), and one for reservations shorter than that. (Actually you can have any number of types, but any other special cases would need manual adjustment after the reservation is imported.)

- If you want or need to enable or set up Site Attribute fields for the various Amp Service values, you can do that (see Data Field Definitions). Typically this would just be whatever you're already using, most often just an option for 50A, so it's not likely that you would need to change this. These will be mapped to Hercules values in the next steps.

- If you want to add or modify Rig Types to correspond with the Unit Types available through Hercules, do that through Maintenance / Pick Lists / Rig Types. Most often you will just use the values you already have set up there already, but in some cases you might want to add some that Hercules offers that are different than the default options in Campground Master. These will be mapped to Hercules values in the next steps.

- If you need special Discount types for discounts offered through Hercules, set those up through Maintenance / Pick Lists / Discounts. This is not usually necessary, since the discounts used online can be mapped to your existing discounts in the following steps.

Configuration:

- Configure the various options (see Maintenance / Online Reservations / Hercules / Hercules Setup):
- Operation options -- update mode, timing, etc. (But don't "Enable" it yet!)
- Reservation creation options
- Parsing options, including:
- Site Data Fields (mapping your Sites to Hercules "Space numbers")
- Amps Service values mapping
- Unit Types values mapping
- Adders Mapping
- Discounts Mapping
- Availability settings
- Connection settings (Hercules account user name and password, etc.)

- Set up Access Levels, for whether to allow the operators to continue when there are warnings (see Maintenance / Park Setup / Access Levels). The access levels for the Hercules 2-way are show in the Access Level list with the prefix "Hercules Online Res. - Allow continuing....".

- Set the Alerts Options, for when handling user alerts such as new reservations received or synchronization errors (see View / Alerts / Alerts Options). There are also several Access Levels associated with Alerts (see Access Levels in the step above). The Alerts access level settings are just below the Hercules access levels in the list.

- If you were using the 1-way Friend integration before, disable it (see Maintenance / Online Reservations / Other Online Interfaces / Connections & Options / Reservation Friend, and uncheck the "Enable" box).

Starting Communications

- When ready to "go live", <u>Enable</u> the Hercules functionality to begin communications (see Maintenance / Online Reservations / Hercules / Hercules Setup).

- Also note that you need to make sure Campground Master is not being blocked from the Internet by any security software or firewall. You may see a warning from Windows Firewall, for instance, asking whether Campground Master should be blocked -- make sure you always "Allow", "Unblock" or "Approve" Campground Master. If you don't see this message, it might be that Campground Master had been blocked before. If you get an error indicating that it can't communicate with Hercules, check your firewall and security settings.

- Most likely it will initiate a full synchronization upload right away, followed by a download if there are already reservations online to be downloaded. You won't see any of this happening, unless there is a problem or something is downloaded that needs your attention. Then you may see an Alert that new reservations have been automatically imported, and/or an Alert that reservations could not be automatically processed and need to be manually processed. See the Initial Synchronization section for more details.

- From here on it should be communicating and in sync. If you log into the Hercules web interface and refresh the grid, you should see an "External reservation" for each of your Campground Master reservations (or a customer name if it was initially created online). You may also see a "Maintenance Hold" on sites that you've designated as Unavailable. If you don't see this within a few minutes, there may be a communication problem and you need to contact support. Be sure to read through the Operations sections for more information.

Conversion from 1-way integration

If you have already been using the 1-way integration with Reservation Friend, then the applicable part of your setup will be transferred automatically.

The same Site field for the Hercules Space Number of each site is used, so the ones you have filled in will still apply. However, since you can put your entire site inventory online with the 2-way interface, you should **fill in the Hercules Space Numbers for the rest of your sites** (and don't forget to **enable the sites for online reservations on Hercules**, through their Hercules web interface).

Also, a few of the Reservation options, such as the deposit description, operator, and Payment Method will be transferred from your 1-way settings.

If you've set up special Parsing Rules for Adders, such as # adults, # children, etc., those will no longer be used. You will need to map those adders through the Adders Mapping function (which is actually much easier than the parsing rules).

Other settings from the 1-way interface will no longer be used, such as the parsing rules and the E-mail connection options. The 2-way interface no longer uses E-mail, so once you've converted then you don't need that POP3 mail box any more. Also, the Site field for the online release days is no longer used, since it's not necessary to prevent local reservations for "online" sites for certain days in the future.

You should also disable the 1-way interface once you're using the 2-way integration. While it shouldn't interfere, assuming you don't actually retrieve the reservations with that method any more, disabling the 1-way interface will prevent accidentally downloading reservations the old way. To disable the 1-way, go to Maintenance / Online Reservations / Other Online Interfaces / Connections & Options / Reservation Friend, and uncheck the "Enabled" box.

Data Fields

The data fields used for the Hercules 2-way integration will be automatically enabled. For reference, these are the fields involved:

The Reservations data field "**Resv_Online_Request_ID**" -- this is used to store a unique identifier for each online request, to aid in synchronization with the online data.

The Reservations data field "**Resv_Online_Request_Raw_Text**" -- this holds the raw text of the online request. While this isn't technically required, we recommend enabling this just in case there is any question about what came from the online system (especially for troubleshooting). You can view the Online request text through Reservation Details.

The Site data field "**Site_Online_Friend_ID**" -- this will contain the "space number" as it's configured on Hercules.

The Site data field "**Site_Online_Friend_Unavailable**" -- this can be set to a list of date ranges that the site should be unavailable for online bookings.

For details on configuring the site fields, see the Site Data Fields section.

Hercules Setup

Most setup functions for Hercules 2-way integration are accessed through Maintenance / Online Reservations / Hercules / Hercules Setup. This one dialog (with multiple tabs and some sub-functions) covers just about everything needed for configuring the 2-way integration.

Note that communications with Hercules is suspended while this dialog is open (in case any critical settings are changed), so be sure to only go into this during times when there are no other local operations (e.g. on other workstations in a networked environment).

Hercules Setup - Operation

This is accessed through Maintenance / Online Reservations / Hercules / Hercules Setup, Operations tab. These options control the overall operation of the 2-way integration.

If setting up for the first time, we recommend that you leave all of the values on this tab in their default state, and do **not** check the "Enable" box until all other initial setup has been completed. For reference, the recommended values are listed below with their descriptions, but if you're doing the initial setup then you can **skip this section** until you're ready to turn on communications.

Enable Hercules functionality -- naturally this turns the 2-way communications on or off. Note that if this is ever disabled, even for a short time, then a full synchronization with Hercules will be initiated when it's re-enabled.

Workstation ID to poll from -- (a.k.a.. the "Hercules master" workstation) -- If you use Campground Master on a single computer, this should be set to 0. If you have the Networking option, then we recommend that this be set to the Master workstation's ID (see Networking Setup if you're not sure what that is). However it can be set to another workstation if needed, for instance if internet connectivity is not available on the Master. While it does not technically affect operations of the 2-way integration, certain functions can only be done on the "Hercules master", and of course there are added communications delays involved when it's not set to the network Master.

Never poll from this computer, regardless of it workstation ID -- Unlike the other settings, this is set in the INI file on the computer, not in the database file. That means it stays for this computer set even if you restore from a database backup. So this allows you to disable the online synchronization for 'offline' computers, e.g. computers separate from the live system used for training, or off-site computers used for backup or reporting purposes.

Incoming reservation handling -- The recommended setting is "Fully automatic processing". In this mode, Hercules is periodically polled for new reservations, and any new ones are automatically processed and added to Campground Master. If you need a little more control, you can set it to "Automatically check for requests but require manual processing". In that mode you would be notified of new ones available to process -- just be sure to process them immediately when notified to avoid conflicts with local reservations. There is also a "Manual request only" mode, which is primarily used for testing purposes. In this mode, no automatic polling is done, and you have to request reservation downloads manually to find out if any are available.

Alert when new reservations are auto-processed -- While the "Fully automatic" mode imports the online reservations with no operator effort, we recommend that you enable this option so that you can see when this happens. This also gives you a change to review the reservation. See the Automatic Modes section for more details.

Outgoing reservation handling -- The recommended setting is "Fully automatic availability upload". In this mode, all local changes are automatically uploaded to Hercules so that its availability information is updated without any user action required. If you set this to "Manual upload only", then you must initiate the upload each time you want it updated online.

Locks/Temp Holds/Update status checking -- The recommended setting is "<u>Do locks & synchronization, and wait/warn if issues before **completion** of operation</u>". This makes the request but does not make the operator wait for a response -- e.g. they can continue to work on the reservation without delay. Once they are ready to save the reservation, they will be notified if a potential conflict might occur due to an online reservation in progress for the same site. The other options are:

- <u>Skip all site locks & synchronization</u> -- This of course defeats the purpose of real-time 2-way integration, and should only be used for testing or other extreme conditions.

- <u>Initiate locks & synchronization, but don't wait</u> -- This tells Hercules what's going on, but ignores any response that might suggest a conflict. Basically this gives Hercules a chance to lock out sites you're working on locally, but there is still a chance that an online reservation creates a conflict (e.g. if it's started online but not completed & downloaded before you use the site locally). This should only be used if you're having connection problems that are causing severe delays in responses.

- <u>Do locks & synchronization, and wait/warn if issues before **starting** the operation</u> -- This could be used if you don't mind waiting for a response before continuing a reservation, for instance. Naturally this should only be used if the response time is fast enough for your comfort. The advantage is that you avoid the possible annoyance of finding out only at the end of making a reservation that the site isn't available online. This is also a viable option if the majority of your reservations are made online at a rapid pace, such that a local reservation is frequently denied due to an online site lock.

Update frequency -- If either Incoming or Outgoing modes are set to Automatic, this determines how often Campground Master will initiate an automatic update (up and/or down). The default and recommended setting for this is 1800 seconds (30 minutes). This may seem like a long time, but unless you get dozens of online reservations each day then it's probably sufficient. Keep in mind that regardless of this frequency setting, conflicts are still prevented by the site locking. Also note that any time a local operation is initiated, any waiting online reservations are downloaded anyway, and any local changes are usually uploaded immediately -- so this update frequency is mostly applicable to times when Campground Master is idle.

Wait for idle time before attempting update -- This is usually not necessary, as the update takes little time, so the recommended setting is to not check this option. Since downloads happen automatically when starting an operation anyway, this would only be an issue if for instance a major synchronization is needed. If you do enable this, the recommended time is 60 seconds.

Hercules Setup - Reservations

This is accessed through Maintenance / Online Reservations / Hercules / Hercules Setup, Reservations tab. These are various options related to how online reservations are converted to Campground Master reservations, plus a couple options that affect the online site availability.

Default status to use for imported reservations -- You can choose whether the online reservations are created as Pending, Confirmed, or Guaranteed. Since payment is taken online for the reservations, the Guaranteed status is recommended.

Confirmation # format -- This allows you to specify the confirmation number formatting in Campground Master. You can keep this the same as the Hercules confirmation/order number by entering **<O>** here (a special tag for inserting the Online Order ID). Or you can use other formatting options to keep it similar to other reservations in Campground Master, or perhaps add a prefix so you know it's a Hercules order -- such as "RF-<O>" so it looks like RF123456. For full details on formatting options, see the Confirmation # formatting under Maintenance / Program Options / Format Options. The only difference here is the availability of the <O> tag as mentioned above.

Reservation Type for online reservations -- Select the reservation type to use for reservations made on Hercules. This would typically be "Normal", or whatever you've named your normal reservation type (see

Maintenance / Pick Lists / Reservation Types). You could add a special type if you like, but remember that a new type would also need to be configured in your Rates setup so the correct rates apply.

If reservation is (X) nights or longer, use the type -- This option allows you to have a 2nd reservation type automatically applied if the reservation is longer than a certain number of nights. This might be used for instance if you use a custom "Weekly" type for any reservation 7 days or longer. While this could be used for monthlies, it might not be as easy to configure since each month is a different length.

Operator name to use -- You can enter any text you like for the operator name to be shown for the reservation and also any of the transactions automatically added for the reservation. If this is left blank, the transaction and reservation will be recorded with the operator logged in at the time the reservation is processed -- which is not recommended, especially if automatic processing is enabled.

Settings to use for online deposit transactions:

Online reservations will import with a Deposit transaction, showing the payment made online. Here you can specify the description and Payment Method to be used for the deposit.

Item description -- You can enter the transaction description to show (e.g. on receipts) for the deposit. If the this is left blank, it will default to the payment method name.

Payment Method -- You should set up a special Payment Method for online reservations and select it here, so reports and QuickBooks exporting, if used, will keep the online payments in a separate account appropriately. If you first started using Campground Master at version 5.0 or later, then there is already an "Online" payment method defined that you can select. Otherwise, you can add your own to use here (see Maintenance / Pick Lists / Payment Methods). **Don't leave this setting with the default payment method selected (e.g. "Cash")!**

Hercules Setup - Parsing

This is accessed through Maintenance / Online Reservations / Hercules / Hercules Setup, Parsing tab. These are more options related to how reservations are converted from Hercules, and more specifically how the online data fields are converted, or "Parsed", into Campground Master terms.

Ignore country name if matches one of these -- You can enter one or more country names or abbreviations, and if the online data matches one of them then the Country field in the Campground Master customer will be left blank. The recommended setting, for U.S. customers, is "USA,U.S.A.". Note that case is ignored, and multiple entries are separated by commas. If you're in Canada, then you may want to change it to "Canada".

The buttons below open a further configuration dialog, and are thus covered in the following separate sections:

Site Data Fields
Amp Service values mapping
Unit Types mapping
Adders mapping
Discounts mapping

Memo Transactions for Adders, Discounts, etc.

The imported online reservation data contains various details about the reservation's charges (fees). While the only "real" transaction added in Campground Master is the Deposit amount, you can also have it add the various details as Memo transactions for your reference. The recommended setting is to leave these all enabled, at least until you're comfortable that the correct amounts are being charged online.

Ideally you already have Campground Master set up to automatically calculate the charges (Auto-Rates), which will be added automatically when the reservation is created or checked in. Adding these online amount details as memos can serve as a verification that the amounts charged online match your rates, or if you're not using auto-rates, they will serve as a guide to what real Charges should be added for the reservation. Once you have confirmed that everything is correct, you may prefer to delete these memo transactions from the reservation. (Either way, the memos will not appear on the customer's receipt.)

Adding Memos for the Adders and Discounts is covered in the Adders & Discounts mapping functions. There are a few other settings here for adding Memos for the other values:

Add order amount as a memo transaction -- This will show the base rent amount charged for the site (total, not per day).

Add order taxes as memo transactions -- If one or more taxes were charged, these will be shown.

Add order total as a memo transaction -- a Total is also included, which ideally should always match the Deposit and of course the sum of all other charges (Amount, Adders, Discount, and Taxes). However it may be handy to show that as a memo just for verification purposes.

Expression to execute after adding reservation -- To ensure that all special needs can be accommodated, we allow you to create a custom processing script that's executed after the reservation is added. This script will have access to the raw online data through the field Resv:Resv_Online_Request_Raw_Text (provided that you have not disabled that reservation field), and could be used to make any changes to the reservation needed. Naturally this gets into "programming", and falls under Advanced Customizations. For details on what this expression needs to be, see the Expressions details in the Advanced Customizations section.

Site Data Fields

This is accessed through Maintenance / Online Reservations / Hercules / Hercules Setup, Parsing tab, and click the Site Data Fields button. The fields are listed in a grid format, like in Raw Data tables, because it's very helpful to edit them as a group and see the overall view.

Only the online data fields that are enabled will be shown -- so if you just see an empty list, you haven't enabled any of the expected fields (through Maintenance / Data Field Definitions / Sites). Note that if you used other online interfaces in the past, it might show more than the two fields described below. Those "extra" fields can be ignored.

To change fields values, just edit them directly in the grid. Some values will be drop-down lists, depending on the type of field. You can also use copy/paste functions to copy a value to one or more fields.

WARNING -- any changes made here are instant and non-reversible, just like raw data tables. There is no Cancel or Undo function here.

Hercules Space Number -- Set this to the space number for the site as configured on Hercules, which can be different than the Site Name for the sites in Campground Master. For instance, the name might be "RV Site 1", but on Hercules it might be shown as "RV1" or just "1". Note that this only has to be entered for the sites you make available for reservations on Hercules. Leave it blank for sites not listed on Hercules, or if you don't have it enabled for "Online" on Hercules. Of course with the 2-way interface, you can enable your entire site inventory online without fear of conflicts.

Important: If a Hercules space number is entered here that does not match a space configured as an online site in Hercules, it will be unable to lock the site on Hercules and thus error messages will occur when doing local operations. It could also mean that true availability is not being synchronized to Hercules. Therefore it is very important that these match the Hercules data.

Copy Site Abbr/Name of ALL sites to Hercules Num -- For initial setup convenience there are buttons allowing you to copy either the Site Abbr. or Site Name of all sites to the Hercules Space Number. Assuming that the spaces on Hercules have been set up according to either the Abbr or Name field in Campground Master, this will make the setup a 1-click operation.

Hercules Unavailable Dates -- This allows you to block individual sites from online reservations on certain dates. This might be a season, special event, or some other reason that you don't want any online reservations on the site. (While this field affects individual sites, there is also a global setting that allows you to set unavailable dates for all sites at once -- see Hercules Setup / Reservations.)

Take care when using this setting, as entering it incorrectly could result in the site being blocked online for all dates, or not blocked on the dates you expect. After changing this setting and allowing the synchronization to occur, we recommend that you verify the dates through your account on Hercules (through their web interface). You can enter single dates, a date range, or any number of date ranges. You can also enter dates or ranges without a year, so it repeats each year.

Note that any dates set as "Unavailable" in Campground Master using the site's Season Dates Applicable or Special Dates Unavailable Field will automatically be unavailable online as well -- so there is no need to duplicate those dates here. The site will be unavailable online for any of those dates plus any dates set in this field.

For more information on the format of this setting, see the details for setting the Season Dates under Maintenance Functions / Park Setup Functions / Edit Site Details. You can use Copy/Paste (Ctrl-C / Ctrl-V) to copy dates to multiple sites easily, just like you would in Excel.

Amp Service Values Mapping

This is accessed through Maintenance / Online Reservations / Hercules / Hercules Setup, Parsing tab, and click the Amp Service values mapping button.

The reservation data from Hercules includes a single "Amp Service" value, with several different possible values (shown in a list here under "Hercules ID"). However in Campground Master you have a different type of field or multiple fields that need to be set accordingly. This mapping function is used as a parsing rule to determine which Campground Master field to set based on the Amp Service value from Hercules.

Most often, this will simply be a "50A" preference field for the reservation. In fact, if you have the 50A attribute/preference field enabled for Reservations, the values including 50A will be automatically mapped for you. So you would only need to modify or add mappings if the values for 15, 20, 30, or 100 amps mean something for your setup, or if the standard 50A field is not used in your setup to mean that they want 50A service.

The mapping process is as follows:

1. Select (highlight) a Hercules ID to map in the left-hand list.

2. Select a field from the Reservation Field drop-down list.

3. Select the Value to set field to in the next drop-down list, or enter a value. For preference fields like 50A that have pre-defined values (e.g. "Must Have" or "Must Not Have"), you should select from the drop-down list. If the field does not have designated values, simply type the desired value.

4. Click Add Mapping. The details of the mapped value will appear in the bottom list.

5. Repeat for all values that require fields to be set, then click Save.

Note that there is no need to map values if you don't need a field set for them in Campground Master. For instance if the only field of interest is 50A, then you only need to set the mapping for the Hercules ID's with 50 in them (and they would all be mapped to the 50A field, value set to "Must Have".

Mapping Notes

You can map multiple Hercules ID's to the same Reservation Field if needed.

If you need to change a mapping, select it from the bottom list and click Delete/Edit. 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 needed and click Add Mapping again.

Unit Types Values Mapping

This is accessed through Maintenance / Online Reservations / Hercules / Hercules Setup, Parsing tab, and click the Unit Types values mapping button.

The reservation data from Hercules includes a "Unit Type" value, with several different possible values (shown in a list here under "Hercules ID"). In Campground Master you have a "Rig type" field that needs to be set accordingly, but your values might be different. The possible Rig type values in Campground Master are defined in the Rig Types Pick List, which you can modify if desired (see Maintenance / Pick Lists / Rig Types). However it's not necessary to create perfectly-matching values in the pick list, since you can use this mapping function to convert the Hercules values to Campground Master values.

If you still have any of the default Rig Types in your pick list, some of those values which match up with Unit Types will be automatically mapped for you. So you may see several values already mapped when you go into this function. You only need to see if the other Unit Types need to be mapped to your Rig Types.

The mapping process is as follows:

1. Select (highlight) a Hercules ID to map in the left-hand list. (The numeric value is shown next to the name only for reference, and is not important.)

2. Select the corresponding type from the Rig Type Value drop-down list.

3. Click Add Mapping. The details of the mapped value will appear in the bottom list.

4. Repeat for all ID's/values that might be selected on Hercules, then click Save.

Note that there is no need to map Unit Types if they do not apply or would never be used on Hercules. For instance if you don't have a marina, there's no need to map the "Sailboat" value.

Mapping Notes

You can map multiple Hercules ID's to the same Rig Type if needed.

If you need to change a mapping, select it from the bottom list and click Delete/Edit. 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 needed and click Add Mapping again.

Adders Mapping

This is accessed through Maintenance / Online Reservations / Hercules / Hercules Setup, Parsing tab, and click the Adders mapping button.

Hercules uses "Adders" for extra add-on fees and values like # adults, # children, # pets, etc. This function is used to convert their Adders into field values and/or transactions in Campground Master. For instance, the # Adults adder needs to be mapped into the # Adults field for the reservation.

The key here is that you need to know the "Adder ID" from Hercules for each adder used for your online reservations setup. These vary by account, so you need to find out what your Adder ID's are from Hercules.

The process is as follows:

1. Enter a Hercules Adder ID to map.

2, Enter a Description (optional -- this is for your own reference).

3. Select the corresponding Reservation Field in the drop-down list. Use the "(none)" option if no field needs to be set, but you want to specify a transaction to be added.

4. If a field was selected, select the Value to set field to in the next drop-down list, or enter a value. For preference fields like 50A that have pre-defined values (e.g. "Must Have" or "Must Not Have"), you should select from the drop-down list. If the field is a numeric or text field, you can either enter a fixed value or choose an option from the list to copy the Qty as-is from the Hercules adder, or to use the Qty with an adjustment.

5. If "Use Qty from adder, with adjustment" was selected in the step above, then enter an Adjust qty by amount. This would be used for instance if you have an adder for "# vehicles" on Hercules, but in Campground Master it's used for "Extra vehicles", meaning that one vehicle is allowed and Extra vehicles only needs to be set to the amount more than one. Thus you would enter a -1 (negative 1) in the Adjust qty by field, so it sets "Extra Vehicles" to one less than the "# Vehicles" adder qty.

6. If the field selected in step 4 was a text field, you will have the option to Append to the existing text in the field. Check this option if you don't want to overwrite other data in the field, such as Notes.

7. If applicable, check the Only use if Qty is greater than option and enter the amount. This allows you to have it skip the field setting if the adder qty won't matter. For instance in the Extra Vehicles example above, you would enable set this option and set it to 1, so that it only applies if the "# Vehicles" Adder qty is more than 1.

8. If you want a memo transaction added for the adder, select the transaction type in the Add a Transaction for the adder as list. You can choose a normal Memo or a Printable Memo (which would appear on the customer's receipt). Keep in mind that you will often be adding Charge transactions as well, for the real charges, so the Memo transactions are not required -- but they can be handy for verification since the Memo can show the amount charged on Hercules for the adder.

9. If adding a transaction, you can enter a Transaction item description. If this is left blank, a default description will be used that includes the adder ID, description, qty and amount from Hercules. Since these are often more lengthy than desired, you can enter a shorter description here. You can use "place holders" in the description that will be replaced by adder information. For instance, entering "Adults:%Q% = %A%" here would result in a description like "Adults:3 = $6.00".

10. Click Add Mapping. The details of the mapped value will appear in the bottom list.

11. Repeat for all adder ID's that might be used on Hercules, then click Save.

Mapping Notes

If an Adder is received from Hercules that is not mapped, it will be added to the reservation as a generic Memo transaction. This allows you to see the information in the Reservation, including the Adder ID, so you can set a field if needed and go back and correct the mappings for next time.

If you need to change a mapping, select it from the bottom list and click Delete/Edit. It will be removed from the bottom list, but it will also be selected automatically in the fields above, so all you have to do is make any changes needed and click Add Mapping again.

Multiple mappings may be created for the same Hercules Adder ID, for instance if you need to set multiple fields for it.

Discounts Mapping

This is accessed through Maintenance / Online Reservations / Hercules / Hercules Setup, Parsing tab, and click the Discounts mapping button.

Hercules can apply "Discounts" similar to the way Campground Master does, for Good Sam, AAA, etc. This function is used to convert their Discount ID's into field values and/or transactions in Campground Master.

As with Adders, the key is that you need to know the "Discount ID" from Hercules for each discount used. These vary by account, so you need to find out what your Discount ID's are from Hercules.

The procedure for setting up Discount mapping is almost identical to the Adders mapping, so it's not detailed again here. There is just one primary difference in the Discounts mapping -- instead of the focus being on a quantity, as in adders for # Adults for instance, Discounts are typically either present (if it applies) or not present.

Therefore, instead of setting a field quantity, generally you will just set the Discount field to the appropriate value for each Hercules discount ID -- e.g. for the Hercules ID for a Good Sam discount, set the Reservation Field "Discount" to the value "Good Sam". The important thing is to make sure you're entering the Value exactly as you have it in the Pick Lists for Discounts -- including the precise capitalization.

Hercules Setup - Availability

This is accessed through Maintenance / Online Reservations / Hercules / Hercules Setup, Availability tab. These options affect the availability of sites for online reservations.

Owner reservations make the site unavailable for online reservations -- If you use the "Owner" reservation type, then this setting depends on the way you use Owners in Campground Master. If Owner reservations are on sites truly owned by someone and available for sub-letting to overnight campers, etc. when the owner is not present, then this option should not be checked. Thus it's available online as long as there isn't another reservation on top of it (and this also requires you to make normal or Free Stay reservations on the site when the owner is actually present, to avoid double booking). However if you use the Owner type for other situations, such as a Seasonal, where the site should not be occupied by anyone but that one person, then you should check this option to keep it unavailable for online reservations.

Special dates unavailable for online reservations -- This allows you to block all sites from online reservations on certain dates. This might be a season, special event, or some other reason that you don't want any online reservations on any site. (While this setting affects all sites, there is also a Site field that allows you to set unavailable dates for individual sites.) Take care when using this setting, as entering it incorrectly could result in all sites being blocked online for all dates, or not blocked on the dates you expect. After changing this setting and allowing the synchronization to occur, we recommend that you verify the dates

through your account on Hercules (through their web interface). You can enter single dates, a date range, or any number of date ranges. You can also enter dates or ranges without a year, so it repeats each year. For more information on the format of this setting, see the details for setting the Season Dates under Maintenance Functions / Park Setup Functions / Edit Site Details.

Max future days to upload for "unavailable" status" -- The recommended setting is 1096 days (3 years). While someone could technically make a reservation online for a date more than 3 years in advance, it's not likely. This setting determines how far in the future that "season" or "unavailable" dates for sites (or the unavailable dates setting above) affect the online availability, particularly if you use date ranges without the year included (so they apply to every year in the future, forever). The larger you make this number, the longer a full synchronization upload could take -- otherwise it does not affect normal operations.

Hercules Setup - Connection

This is accessed through Maintenance / Online Reservations / Hercules / Hercules Setup, Connections tab. These settings are critical for the connection itself. Once these are set, there is usually no reason to ever change them.

Automatically connect to the Internet each time -- If your internet connection is high-speed (always-on), this setting won't matter -- but we recommend that this option be checked anyway. However if you use a dial-up internet service, you can select this option to connect automatically when it needs to communicate. Of course if all you have is dialup, the 2-way interface is probably not going to work for you anyway.

Customer # and Password -- You will need to enter the appropriate settings for connecting with your account on Hercules. Contact Leisure Interactive to get the proper settings -- keep in mind that these are **not** the same as the Username and Password that you use to log in to the online interface. Be sure to ask for the 2-way interface customer number (they also call it the Record # and it's usually a 5-digit number) and have Leisure Interactive set up a 2-way interface password for you.

Download & Upload host/file/port -- These entries default to the proper settings to use, as of the time of this writing. **Be careful not to modify them!** Just in case you need to fix them, here are the correct settings (again, accurate as of the time of this writing, but they may change if Hercules changes its servers):

Download host:	**http://hercules.reservationfriend.com**	Port: **80**
Download file:	**/Sync.aspx**	
Upload host:	**http://hercules.reservationfriend.com**	Port: **80**
Upload file:	**/Sync.aspx**	

Local Working Directory -- This is where it will save the downloaded requests locally, for temporary processing. Other temporary files may also be placed there, for instance the availability data to be uploaded. The recommended setting is to leave this blank, which means it will use the same folder as the Campground Master database. If you prefer to put it somewhere else, enter the entire path name here. However be very careful that the path actually exists and has the necessary permissions for Campground Master to manipulate files there.

Hercules Setup - Diagnostics

This is accessed through Maintenance / Online Reservations / Hercules / Hercules Setup, Diagnostics tab. While mostly applicable for diagnostic issues, there are some timing settings here. These settings should be left at their default values unless you're having problems and our support recommends changes to them. Therefore no details on the settings will be provided here.

Hercules 2-way Operations

Overview

Once all of the Hercules Setup is completed, you're ready to enable the 2-way communications. Campground Master will be linked to Hercules in much the same way as 2 workstations are linked in the Networking system.

The main difference between this and local networking is that Hercules can't initiate any communications with Campground Master -- Campground Master must initiate each exchange of data. While this means that online reservations aren't always "immediately" shown on Campground Master, it's close enough. Any online reservations not yet downloaded will be received as soon as a local action is initiated (when Campground Master checks for a site lock and synchronization), or when the polling frequency says it's time to poll -- whichever comes first. The important thing is that conflicts can't occur.

Initial Synchronization

If you have not already done so, and assuming you've completed the rest of the setup, then you should check the "Enable" box under Hercules Setup. That will start the communications task and begin the count-down to the next polling time (assuming Automatic mode). Nothing will happen immediately -- but if you begin to make a reservation or edit an existing one on a Site that's also available online, then it will begin communications.

The first time it communicates, it will automatically Send a Full Synchronization to Hercules. You can also do this manually, through the Hercules menu, if you don't see your reservations on Hercules (through their web interface). This function sends all local availability information to Hercules. After that, it will most likely Request a Full Sync from Hercules. This will verify that the sync upload worked, as well as check for any online reservations that we don't have locally. Again, it wouldn't hurt to request one manually, just so you know it's done.

If the synchronization goes well, you may see one or more of these Alerts:

<u>ALERT -- ERROR -- Sync errors found in Hercules download synchronization</u>

This can be expected one time during the first synchronization, especially if there are any online orders that were entered manually in Campground Master. You can safely ignore the first time this error appears (just "Dismiss" the alert). If it continues to appear, though, more attention is needed (see the Error Handling section).

<u>ALERT -- Online Reservations received from Hercules</u>
<u>One or more Online Reservations have been automatically imported from Hercules...</u>

This indicates that some online-created reservations were on Hercules that had not yet been imported to Campground Master (e.g. through the 1-way integration). This could be a normal situation, e.g. if you have not retrieved online reservations in awhile. Note however that if you had been manually entering the online reservations previously, then this may indicate that the online reservation has been imported as a duplicate, e.g. if you had assigned it to a different site when you entered it manually (so it didn't notice a conflict). You should review the imported reservations using the "Review Now" button on the Alert (or go to Reservations / View Recent Online Reservations), and make sure they are accurate and that they weren't duplications of previously imported reservations.

Note that when you "Review" the reservations, you may not see them immediately because the "View Recent Online Reservations" dialog it uses will default to just showing today's reservations. Adjust the "From" date as needed to go back and see older reservations.

ALERT -- ERRORS in Online Reservations received from Hercules
One or more Online Reservations could not be automatically processed....

This indicates that some online reservations were downloaded but could not be imported automatically due to some error (usually a confict). While this could be actual double-bookings created prior to enabling the 2-way integration, this would commonly be due to manually entering the online reservations prior to enabling the 2-way communications. The online reservations will appear as conflicts with the ones you manually entered, when in reality they are the same reservation. It's important that you "Link" them so that instead of showing them as a conflict, they will be tagged with the appropriate online Order ID so they can synchronize properly with Hercules.

Another likely cause of this error is a mis-match of the "Space number" or missing space numbers (an error in setting up Site Data Fields).

Processing the errors

You will need to correct the errors before it will consider Campground Master "synchronized" with Hercules. To discover the cause and correct the problems, use the "Process Now" button on the Alert (or go to Reservations / Retrieve Online Reservations). This will get you to the Retrieve Online Reservations dialog. Any problem reservations will be shown in the list here as Unprocessed.

If you double-click on one of the reservations to process it, an error message should be shown reporting either a **conflict** or that **no matching site** was found.

It will then open another dialog showing the reservation details, where you could select an available site and "Save" the reservation -- assuming it really is a new reservation that needs to be imported. (Again, note that if it wasn't a conflict and didn't find a matching site for it, then that's a problem in the Site Data Fields setup.)

If it shows as a conflict, presumably because the reservation had manually been entered already and is thus a duplicate, then you need to use the "Link to an existing reservation" function to link the online reservation with the one already in Campground Master. Close/Cancel the Details dialog to get back to the list of reservations, select the reservation, and then click the "Link to an existing reservation" button at the bottom.

That will open a Find Reservation dialog, where you can enter the last name to locate the existing Campground Master reservation that matches the online request. **Tip** -- you may want to move the Find dialog around so you can see the online reservation information in the grid to help match up the customer, site and dates to make sure you have the right one.

Once you locate the desired local reservation and click "Use", the local one will be updated with the Online Order ID so they will stay synchronized. No other information from the online reservation is kept, since it should already be in the local reservation. The reservation will be marked "Saved" in the list to confirm this. Continue selecting each reservation listed to select a site or link it, and once all are "Saved" then close the dialog.

See the documentation on the Retrieve Online Reservations function for more details on this dialog if needed.

Other Synchronization Errors

If there are any problems with the synchronization, a dialog or Alert will appear with a list of problems. These may include local reservations that aren't on Hercules (failure to sync properly), or online reservations not in Campground Master, or reservations that have a mismatch in the data. These are covered in the Error Handling section.

Manual Mode

Downgrading to a Manual mode is not recommended due to the possibility of a conflict. It's considered "manual mode" any time you have either Incoming or Outgoing modes set to something other than "Fully Automatic", and the Site Locking setting set to something other than one of the "Do locks & synchronization..." options. These settings are found under Maintenance / Online Reservations / Hercules / Hercules Setup / Operations.

If you need to use manual mode due to internet problems, or perhaps because the reservations aren't being imported properly (a Setup issue), then there are some things you need to be aware of:

- Naturally, conflicts can occur in this mode. The less often you initiate a manual upload or download request (through Reservations / Retrieve Online Reservations), the more likely someone online could book a conflicting reservation. If a conflict occurs, you'll be given the chance to assign the online reservation to a new site after you retrieve it.

- Also be aware that the customer is always sent a confirmation from Hercules when they make the reservation, even in Manual mode -- so if you have to make changes to the reservation then you should notify them of the changes.

To get Hercules site availability up to date when the Outgoing mode is manual, go to Reservations / Retrieve Online Reservations, make sure the Source shows "Hercules 2-way", and click the "Update Site Availability" button.

To get Campground Master up to date with any reservations when the Incoming mode is Manual, go to Reservations / Retrieve Online Reservations, make sure the Source shows "Hercules 2-way", and click the "Retrieve Online Reservations" button. If any are received, process them (see the Retrieve Online Reservations section for details).

Automatic Mode

For complete real-time communications and to eliminate the possibility of conflicts, you need to have both Incoming and Outgoing modes set to "Fully Automatic", and the Site Locking setting set to one of the "Do locks & synchronization..." options. These settings are found under Maintenance / Online Reservations / Hercules / Hercules Setup / Operations.

In this mode, Hercules is periodically polled for new reservations, and any new ones are automatically processed and added to Campground Master. Synchronization occurs not only at pre-defined polling intervals, but also any time you begin to make a reservation or edit an existing one on a Site that's also available online. It will do the following before every operation:

- Check for "Temp Holds" on Hercules, to see if someone is trying to reserve that site online at this moment.
- Lock the site(s) selected for the reservation, so it cannot be used online (if it's not already being used).
- Receive any new reservations made online since the last check.
- If a full synchronization is needed, either up or down, initiate that to get in sync.

All of this will happen automatically behind the scenes. You will only "know" it's happening if you get an Alert of new reservations received or sync problem, or if the site you're working on cannot be locked online (see Error Handling).

Automatic Reservation Processing

While there's an option to process the online reservations manually once they're received, this isn't recommended due to the potential for conflicts. However you can be notified when a new reservation is received (which we recommend), and given the chance to immediately review it and make adjustments if

needed. If everything is set up perfectly in the Parsing section of the setup, adjustments should rarely be needed. The online reservation is automatically converted into a Campground Master reservation on the site selected online, all customer data fields are imported, Deposit transaction added, etc., and it will appear on the Rack and other views immediately. If you have Auto-rates enabled, and have chosen the option to auto-calculate when a reservation is Created, then that's also done when an online reservation is processed.

However, one reason you should review all incoming reservations is to check for duplicate customers, so you can merge them into a single customer record (or check that customer's history for problems). This is done through the View Recent Online Reservations dialog, which will highlight possible duplicates and allow merging them, as well as highlight any where a possible duplicate has a Warning flag.

Manual Syncing to update Unavailable sites

You should do an occasional "Send Full Sync" (see Initial Synchronization), just to make sure Hercules is up to date with any dates you've set as Unavailable (and to double check for reservation sync issues).

If you need details on why this is necessary: While *changes* to the database always trigger automatic updates to the online availability, this does not address the issue of a moving timeframe. Since the full sync only covers a limited number of days in the future, as those days not yet covered approach, the online availability information can become stale. The setting you use for "Max future days to upload" is an important part of this. For instance if Hercules allows reservations to be made 2 years in advance, but you tell Campground Master to only upload 365 future days, then you're already starting out with a 1 year gap -- it will appear as if the whole park is available after 1 year. If you set the "Max future days" to match the Hercules future allowance (e.g. 2 years), that's fine for the first day. But 1 month later, there's still a 1 month timeframe at the end that Campground Master has not uploaded availability for.

Since new reservations are always uploaded, this is generally not a problem if you don't have any Season Dates or Special Dates Unavailable set in the Site Setup, and don't have any dates as "Special dates unavailable for online reservations" in the Hercules setup. Otherwise, the manual syncing is important.

Online Reservation Handling

Once a reservation from Hercules is imported into Campground Master, whether through the manual or automatic mode, you generally work with that reservation in Campground Master the same way you would any other reservation. If you change the site or dates, those changes will automatically be reflected on Hercules. So there is no need to go through Hercules to adjust the reservations or your "holds".

However, there are a couple things that require special handling:

Cancellations

When you cancel an online-originated reservation in Campground Master, it will automatically be removed from the Hercules grid appropriately (assuming the 2-way interface is enabled and in automatic mode). However, it does not cause any refund transaction to be processed in Hercules. You must manually process any refund due the customer, as described below.

Refunds

Whether due to a cancellation, a shortened stay or any other reason that some refund needs to be given to a customer, refund transactions done in Campground Master do not automatically go through Hercules. If you're giving the refund in cash or some other form of credit, you can do that in Campground Master and not worry about Hercules. However, we recommend that you process the refund on Hercules so the refund is credited to the original credit card that the customer used. There are two important reasons for this:

1. It will reduce charge-backs and other customer confusion by ensuring that the credit will show the same business name on their statement as the original charge, and of course will go to the same credit card.

2. It will reduce your costs by crediting the Hercules booking fee for the original reservation back to your account.

To handle the refund in both Campground Master and Hercules, you will need to follow these steps:

1. As with any refund in Campground Master, you will enter appropriate "reversed" (negative) Charge transactions to show that the service or product is not to be charged for. To do this, Manager access will likely be required. For details, see Working with Transactions.

2. Enter a Refund transaction in Campground Master for the amount to be refunded, and select the Payment Method you're using for the online reservations (as defined in Hercules Setup / Reservations). It's important to use this same payment method so that the refund comes out of the correct reporting account.

3. Log on to Hercules (through their web interface), and locate the reservation to be refunded. If it was a cancellation, it will no longer be on the grid so you will need to look it up. it will help to have the Online Order ID for it -- when you do the Refund in Campground Master, a message will appear with that ID -- otherwise, you can find it on the Reservation Details dialog in Campground Master.

4. Process the cancellation and/or refund in Hercules.

Viewing Recent Online Reservations

This dialog is access through Reservations / View Recent Online Reservations. It can also be opened directly from an Alert that new reservations have been auto-processed by the Hercules 2-way interface.

Here you can view all online reservations (those with an Online ID), according to Date Made. It defaults to the current day, but you can change the From date to view older online reservations, and also use the To date to see any specific date range.

Color coding

Reservations in the list are color-coded for 3 different factors:

Acknowledged -- These are show with green text (regardless of the background color used by the other factors). You can manually "acknowledge" an online reservation (click Mark Selected as Acknowledged), to show that you've done whatever you need to do to it. While it isn't necessary to acknowledge them, it can be handy if you have to process a lot of reservations and can't which ones you've verified. Note that there is no way to "undo" the Acknowledge, so use it with care.

Possible Duplicate Customer -- These are shown with a yellow background. Rather than just checking the name, this uses the same duplicate checking functionality that's optionally used when making local reservations. See Maintenance / Program Options / Reservations / Duplicate Customer Checking. If you want to try to merge a possible duplicate, select it and click Merge Duplicate Customers. See that section for

details.

<u>Warning Flagged</u> -- These are shown with a red background. This indicates that the actual customer selected for the reservation has a warning flag. Note however that this doesn't indicate whether a possible duplicate of this customer is warning flagged. Thus if it's in yellow, meaning a possible duplicate, you should use the Merge function to find out if it's a duplicate of a warning-flagged customer.

Functions

<u>Mark Selected as Acknowledged</u> -- As mentioned above, this simply flags the reservation. Typically used after you've verified that the reservation is OK, checked for duplicates, etc.

<u>View the Selected Reservation Details</u> -- This goes to Reservation details (you can also just double-click the reservation), where you can review it and make any adjustments needed.

<u>Merge Duplicate Customers</u> -- As mentioned above, this allows you to check any possible duplicates and use the previous customer information instead of the new customer added for the online reservation.

Possible Duplicate Customers Found

This dialog is used when the "Merge Duplicate Customers" button is selected on View Recent Online Reservations. It will show any "suspected" duplicates, not based on name but using the same duplicate checking functionality that's optionally used when making local reservations. See Maintenance / Program Options / Reservations / Duplicate Customer Checking.

Detailed instructions are shown on the dialog itself -- basically you can select an old customer to use instead of the customer info submitted online (the information in the online customer record will be lost, so be sure to check for any differences and update the *old* record with the new information (using "View Selected Customer Details") before clicking the "Use Selected Customer" button.

Only one customer can be selected, which will replace the online customer. If you see other duplicates that should be merged, you'll need to do it through the Find Customer dialog (Customers / Find Customer).

View Diagnostics Window

This function, under Maintenance / Online Reservations / Hercules, opens a window showing the communications status and progress, and allows some diagnostic functions. Users should not perform any actions here unless under the direction of support personnel.

Send/Request Full Synchronization

These functions, under Maintenance / Online Reservations / Hercules, will send full availability information to Hercules, or request a full download of reservations and availability from Hercules. These can be used any time (form the Hercules Master only), but should only be used for initial synchronization or when a problem is suspected.

When invoking one of these two functions, a results window will be show if you wait for the response (e.g. don't open any other dialogs before the reply is received). Depending on the size of your park and number of reservations, it may take a few seconds to several minutes.

Unlock All Sites

These functions, under Maintenance / Online Reservations / Hercules, will send an "unlock" request to Hercules for all sites. This may be used if you suspect that some sites have been stuck as "locked" on Hercules (which can be seen on the grid in the Hercules web interface). Be sure not to use this if there are any dialogs open locally (including any networked workstation), since that could unlock a site before it really should be unlocked.

Error Handling

Certain error and warning messages generated by the 2-way interface need to be acted upon to ensure proper synchronization. Some of the common messages and actions to take are covered below, particularly for messages that are not completely self-explanatory. (Note that the wording of the messages may not be exact.)

Synchronization errors

These general messages may be shown after a download synchronization (or possibly at other times):

Hercules response indicates that the 2-way interface is not supported for this account

If you see this message, you need to contact Leisure Interactive and have them enable the 2-way interface for your account.

Hercules response indicates that the password is incorrect

The Password you specified in Hercules Setup / Connections does not match the password set up on Hercules for the 2-way interface. (Or it's possible that the Customer ID is incorrect so it's trying to connect to someone else's account, so check that also).

Hercules response indicates that the Customer ID is incorrect

The Customer ID you specified in Hercules Setup / Connections is not recognized as a valid ID by Hercules.

Download synchronization received, with one or more new (or unknown) orders included.

This is a normal response after a Request Full Synchronization, meaning that there were new orders. Depending on your settings, you may need to process these manually (Reservations / Retrieve Online Reservations).

Download Synchronization results show some errors in Hercules data

This will be followed by a list of individual reservation mismatch errors:

Reservation should have been in download, but was not

This indicates that Hercules does not have the reservation online, but we have it locally so it should be on Hercules also. The 2 main causes of this are Hercules Space Number mismatches (so Hercules is not accepting the upload for the site, and you need to check the Site Data Fields), or a reservation made online was put in Campground Master manually so it doesn't have the proper Online Order ID associated with it. In the latter case, you may also get corresponding errors that Hercules has a reservation we don't have (and is available for processing), or possibly auto-processing errors reporting a conflict. Both of these can be rectified by going to Retrieve Online Reservations, where they should be shown as unprocessed, and use the "Link to an existing reservation" function to link the online reservation with the corresponding reservation in Campground Master.

Hercules reservation was not found locally (possibly new)

This most likely corresponds to a local reservation reported with the error above. It should now be in the queue to process -- and needs to be "Linked" to an existing reservation through Retrieve Online Reservations.

Hercules reservation was not found locally, but Order ID is blank so it's not 'new'
Hercules reservation was not found locally, but has a Record ID so we should have had it

Either of these is a severe error, since it indicates Hercules has a reservation we uploaded to it but we don't have it here. This should only happen if a reservation was deleted locally but somehow not deleted online. A Send Full Synchronization should resolve it.

Hercules shows this reservation on <space>, but we show it on <space>
Hercules shows this reservation starting on <date>, but we show it starting <date>
Hercules shows this reservation's last night as <date> but we show it ending <date>
Hercules shows this reservation as active, but we show it inactive

Any of these errors indicate a failure in communications, specifically something was changed locally but the change was not received or processed by Hercules. A Send Full Synchronization should resolve it.

Site Locking errors

One of these errors may appear when attempting a local operation (a response to a Site Lock). If it's a Warning, you have the option to bypass it and continue (but you'll need to deal with possible conflicts when the online orders are processed). It's generally recommended to cancel the operation, e.g. go back and choose another site or clear the cause of the error and try again.

Some online reservations have been received but not processed, so we're not up to date with Hercules data

This indicates that some reservations are in the queue to process manually (Reservations / Retrieve Online Reservations). This shouldn't normally occur in automatic mode.

We're not up to date with Hercules data (download in progress)

This indicates that it's currently downloading new reservations. You should try again in a few seconds.

We may not be up to date with Hercules data (initial synchronization not complete)

This indicates that it's in the midst of synchronizing. You should try again in a few seconds.

Hercules response to the site lock indicates that Hercules does not recognize the space number

The Hercules Space # specified in Site Data Fields for the chosen site does not match the space description on Hercules, or else that site isn't selected for "Online" availability on Hercules.

Site is currently in use for an online reservation in progress on Hercules.

This means that someone online is making a reservation for the same site (Hercules has a "temporary hold" on the site). Since the dates are not yet known online, and it doesn't know what dates you may end up with locally, there's a possibility of conflict. Note that a "temporary hold" may persist for up to 20 minutes even if they abandoned the online reservation. You have the option to keep trying (you should wait a few minutes between each try), or if the operator access level allows it then you can ignore the error and continue. Just be aware that if they do complete the online reservation there may be a conflict -- this would show as an Alert on the Hercules master workstation.

Hercules response to the site lock was not recognized

An error response or some other unknown response was received from Hercules. If this persists, it may require diagnosis of the problem using the Diagnostics window or log files -- check with technical support.

Either the 2-way interface is not supported for this account, or the Customer ID or Password is incorrect

Hercules is returning an error message indicating that one of those 3 conditions exists. This may be a problem with the settings in Connections, or you might need to have Hercules enable the 2-way interface for your account. To find out which condition is really the problem, Request a Full Synchronization from Hercules.

Hercules link is down, so we cannot check whether or not the Site is currently in use

The means it can't get a response from Hercules, or the communications is disabled (and cannot retry).

A timely response to a site lock was not received from Hercules

This could just be a temporary delay in communications, due to other operations or a slow interface. You should try again a couple times to see if it clears up. Also note that you need to make sure that Campground Master is not being blocked from the internet by any security software or firewall. You may see a warning from Windows Firewall, for instance, asking whether Campground Master should be blocked -- make sure you always "Allow", "Unblock" or "Approve" Campground Master. You should also check your firewall and security settings.

Alerts

These are the typical Alert messages that can be generated from the 2-way interface.

Online Reservations received from Hercules

If the Incoming operations mode is set to "Manual only" or "Automatic download but manual processing", this indicates that a new reservation has been downloaded but requires manual processing. The "Process Now" action can be used to go to the Retrieve Online Reservations dialog to process it.

If the Incoming operations mode is set to "Fully Automatic", this indicates that a new reservation has been downloaded and has been processed, but you may want to review it. Use the "Review Now" action to review it through View Recent Online Reservations.

ERRORS in Online Reservations received from Hercules

This occurs when using Fully Automatic mode if a reservation cannot be automatically processed for some reason -- e.g. an unknown site, conflict, missing data, etc. The "Process Now" action can be used to go to the Retrieve Online Reservations dialog to process it.

ERROR -- Sync errors found in Hercules download synchronization

This can occur after a synchronization was attempted, if comparison with the local data shows reservations either missing, extra, or different in the download sync received from Hercules. While this might be normal during initial synchronization before it gets completely synced, this should not be the case during normal operations after an initial synchronization.

The recommended action is to attempt a manual "Send full sync", followed by a "Request full sync", to see if it clears up. If you still get errors, contact support. It might be that there are some mis-matches in the Site Data Fields or some other setup issue.

Retrieving Online Reservations

Overview

To retrieve online reservations and update online availability information, go to Reservations / Retrieve Online Reservations. Of course you will first need to have everything set up appropriately first -- refer to Maintenance / Online Reservations for complete details.

Retrieving Hercules 2-way Requests

If using the Hercules 2-way integration, it's generally not necessary to retrieve requests here unless the Incoming operations mode is "Manual request only". In automatic modes, any reservations available should already be downloaded and listed here. In "Fully Automatic" mode, there should not be any here unless there were errors that caused them to not be imported. In that case, any reservations that could not be imported automatically will be shown here, even without doing a "Retrieve" operation..

To Retrieve any pending requests:

Retrieving and processing online requests generally requires a few steps:

1. Select the desired Source (only sources you've enabled will be shown, and thus there may only be one source option).

2. Retrieve Online Requests -- This will go online to retrieve any new requests from the selected source. All requests retrieved will be displayed in the list.

3. View / Process Request Details -- You will need to open each request, perform any necessary functions like selecting a site, entering the deposit, etc., and then Save it.

4. <u>Upload Site Availability</u> -- Whether or not there are any new requests, you can upload the current availability information to the Internet.

If you're set up for more than one source (e.g. E-mail and Reservation Friend), you can repeat the steps above for each source.

Note that the operator access level required to retrieve and process requests is Manager by default, but it can be modified through Maintenance / Park Setup / Access Levels.

Miscellaneous Functions

The main processing functions listed above are described in sections following this one, but there are a few other functions available on the main Online Reservation Requests dialog.

Paste & Process Request Text (does not apply to Hercules 2-way)

This function can be used to manually process requests that can't be retrieved directly, or for testing. For instance, if the only E-mail account you have does not support POP3, then E-mail requests can't be retrieved automatically. You will need to copy the request from the E-mail window, then use this function to paste it into a processing window. The processing will proceed just as if it was retrieved directly, e.g. the parsing rules will be applied to extract the data from the text.

Note that you may need to get the complete "source" text and paste it, including the E-mail header information, for requests to parse correctly. The "Message-ID" part of the header is used as the default Online Request ID, so unless your parsing rules extract another value for this unique ID, the E-mail header must be included. For America Online, you need to use the "View Message Source" function to get the complete raw message text with the header (this may be in various places depending on the AOL version, but it's commonly under the "Actions" menu when viewing a message).

Re-process Downloaded Requests (does not apply to Hercules 2-way)

When requests are downloaded from the source, they are placed in a local file (this helps avoid accidental deletion, since they may be removed from the source as soon as they're retrieved). When you use this re-process function, it will read the file with the previously retrieved data and parse the requests already in it, instead of going online to get new requests. Since all downloaded requests are actually appended to any previous requests in the file, you could potentially accumulate requests indefinitely into the same file. (See the Delete function below to clear the file.)

Re-processing requests won't be necessary under normal conditions, but it's likely to come in very handy while getting started and tweaking your setup. You can simply use this function to read requests from the file, which will of course be faster than downloading them, and it will also grab previous requests that may have already been deleted form the server. Don't worry about creating duplicate reservations, though -- once a request is processed and Saved, its Online ID is stored so can't be processed again. Any of these prior requests that you've saved will be indicated as such in the list.

Delete all Downloaded Requests (does not apply to Hercules 2-way)

Once you're sure that all downloaded requests have been processed (Saved or Ignored as appropriate), you may want to delete the downloaded requests. While deleting them is technically not necessary, this will "clear the clutter" in the temporary files used for storing the downloaded requests. It will also speed up processing (or at least re-processing) of future requests. Of course it will not delete any Saved reservations, since those are already recorded in your database.

Note that this is completely separate from deleting requests from the server (e.g. the POP3 mailbox). You will

generally want to have Campground Master delete them from the server automatically each time they're retrieved to avoid excess accumulation there. See the Online Setup section for the option to delete requests from the server.

Downloading Requests

When someone makes a request from your web site or other online service, it just sits on a web server or in an E-mail mailbox waiting to be picked up, or "downloaded". You should perform this function regularly (preferably a few times per day), for instance anytime you check E-mail, so the requests can be processed and confirmed promptly.

The exception to this is the Hercules 2-way integration, when configured for Automatic mode -- in that case reservations are downloaded and possibly processed automatically, so this function is only needed to resolve synchronization issues.

To check for and retrieve any new online reservation requests, go to Reservations / Retrieve Online Reservations. Select the Source if necessary, then click the Retrieve Online Requests button. Campground Master will connect to the Internet (if necessary), and retrieve any waiting requests. Depending on the setup options, it may also automatically delete the retrieved requests from the server to keep it tidy (this also minimizes the time needed to retrieve requests the next time).

If any new requests are retrieved, they will be displayed in the list. Note that if it retrieves a request that has already been processed, then the status of that request will be shown as "Saved" so you don't process it as a duplicate. Of course if it's automatically deleting requests from the server when it retrieves them, then there shouldn't be any such duplicates to show.

Retrieving Hercules 2-way Requests

This is generally not necessary unless the Incoming operations mode is "Manual request only". In automatic modes, any reservations available should already be downloaded and listed here. Of course in "Fully Automatic" mode, there should not be any here unless there were errors that caused them to not be imported.

When this is done, it simply checks for any new online reservations available through the 2-way interface.

Retrieving E-mail Requests

When "E-mail" is selected as the Source, it will check the POP3 mailbox (as designated in the setup) for any new E-mail messages. It will download all E-mail messages present, and attempt to parse each one to see if it's a request. If there are some messages that aren't recognized as valid requests, they will still be included in the displayed list of requests. The status of unrecognized messages will be set to "Ignored" and the Notes column will show the message subject (so you can see if it's just a junk message). If you see an ignored message that looks like it should be a valid request, you can use the function at the bottom to Edit Original Text, and try to salvage it by editing the text.

All E-mail messages retrieved are also saved in a temporary file "email.txt", located in the folder you designate in the online reservations setup. This can be viewed with a text editor like Notepad or Wordpad if desired. You can use the Re-process Downloaded Requests function to read this file and scan all E-mails again if needed (for instance if you're still testing your parsing rules). Once you're sure that you don't need the saved E-mails any more, use the Delete all Downloaded Requests function to clear this temporary file.

By the way, there is no danger of getting a virus or other malicious E-mail problem, since Campground Master simply scans the text of the message -- it won't run code in an E-mail, and any attachments to the E-mail are completely ignored (actually the attachments are retrieved as text, so they are harmless).

As mentioned in the online setup section, you may want to have all requests go to a POP3 mailbox separate

from your normal E-mail. The main problem with sharing the mailbox is that when you retrieve your other E-mail, you would be removing requests from that mailbox so they can't be retrieved and processed automatically here.

If it's not feasible for you to use a separate POP3 mailbox for requests, then if there are any requests that didn't get picked up the last time you used the Retrieve function, you will need to copy the request text from your other E-mail program and use the Paste & Process function here. Therefore it would be a good idea to do the Retrieve just before you check your other E-mail so that any requests waiting in your mailbox are retrieved automatically. Also make very sure that the "Delete messages from server..." option is *not* enabled in the Online Connections setup for E-mail requests if you're sharing a mailbox.

Processing Requests

Once any new requests have been retrieved, the next step is to "process" them. This is mostly just a matter of looking at the request details to make sure everything is in order, selecting a site if needed, and then save them so they become a real reservation in Campground Master (also creating the appropriate customer record and deposit transactions as needed).

All "new" requests will be shown in the list in the Online Reservation Requests dialog. A "new" request is any request just Downloaded, or added with the Paste & Process function, or Re-processed Downloaded Requests.

The <u>Status</u> column will show one of the following values:

Unprocessed -- It's a new request, not processed and saved as a real reservation yet.

Saved -- It has been processed and saved as a real reservation.

Ignored -- It has been viewed and ignored for now, during this session. This may include retrieved E-mail messages that were not recognized as valid requests.

Error -- The request could not be parsed using the defined parsing rules (either an error in the rule definition or a problem with the request data). If you hold the mouse cursor over that line in the list, the error details will be shown. You should check any of these to see whether they can be salvaged using the Edit Original Text function.

The <u>Notes</u> column would normally show any reservation notes extracted from the request, but if a request has an error or if it's ignored due to missing information, then the Notes column will include the Subject of the E-mail message. This will help you determine if it needs further attention.

Processing a Request

You can view a request's details and process it by selecting the request in the list and clicking the <u>View / Process selected request</u> button at the bottom. As a shortcut, you can also just double-click the request in the list. If it's a Saved request, this will take you to Reservation Details since it's already a real reservation. Otherwise it will take you to the Online Request Details dialog, where you will process the request and make it a real reservation. Once you've saved it there, it will be designated as such on the list and you can continue with the next one.

Once all new requests have been suitably processed by either saving them or ignoring them, you can proceed to uploading the new availability data and/or deleting all downloaded requests to clean things up.

Note that you can also attempt to process requests that have an "*Error*" or "Ignored" status. Of course an

error may still prevent it from being correctly processed, but you can at least see what fields were retrieved. If a request was previously Ignored, you can use View / Process to essentially undo the ignored status and complete the processing for it.

Editing a Request's Original Text

There may be times when a request can't be parsed or processed correctly due to a problem with the original text (e.g. the E-mail message may not be formatted as expected, causing it not to be parsed correctly). As long as the request has not yet been Saved as a real reservation, you can view the complete retrieved request in raw text format by selecting the request and clicking the Edit Original Text of selected request button. This will show the raw text and you can do any editing necessary. When you click Save, it will attempt to parse the request again. Note that the original request will be deleted from the list, and the newly parsed request will be added to the bottom of the list.

Link to an Existing Reservation

This is primarily used for the Hercules 2-way interface to aid in initial synchronizing, for online reservations that were also entered manually in Campground Master so they don't have the Online Order ID to allow synchronization.

Select the online reservation from the list, click this button, and then use the Find Reservation dialog that opens to locate the existing Campground Master reservation that matches the online request. Tip -- you may want to move the Find dialog around so you can see the online reservation information in the grid to help match up the customer, site and dates to make sure you have the right one.

Once you locate the desired local one and click "Use" in Find Reservation, the local one will be updated with the Online Order ID so they will stay synchronized. No other information from the online reservation is saved, since it should already be in the local reservation.

Ignoring a Request

You can designate a request as "Ignored" by selecting the request in the list and clicking the Ignore selected request button at the bottom. This is usually done for requests that you decide not to save, like junk requests. Actually it does nothing except set the status in the list to "Ignored", mostly for your own convenience so you know you didn't skip it by accident, in case you have a lot of requests to process.

Note that ignored requests are not saved in the database at all -- once you close this dialog window, it will be gone -- except that it will still be in the temporary download file as long as you don't click Delete all Downloaded Requests. Thus you could ignore it for now and use the Re-process function later to retrieve it -- at which time it will show "Unprocessed" again (the Ignored status is temporary, it's not remembered). If you just need more information from the customer and may want to keep it later, it would be better to save it as an Inquiry instead of ignoring it (this can be done through the Online Request Details dialog).

Online Request Details

The Online Request Details dialog is invoked through Online Reservation Requests, by selecting an unprocessed request in the list and clicking the View / Process selected request button below the list. As a shortcut, you can also just double-click the request in the list.

Request Fields and Values

The request will be shown in a simple table of Fields and Values. Each field will be shown as extracted from the request data, using the Parsing Rules you've defined. Note that the fields are shown in the order that they were extracted, which is generally the order that they appear in the parsing rules. Only fields that were successfully extracted will be shown. Thus if a parsing rule is defined to set a field like "50 Amp" if it's requested, but it wasn't requested, then that field may not be shown in the list.

Many fields will show both the record type (table name) and field name, for instance "Reservations : First Night". In some cases there may be an index number after the record type, for instance if more than one transaction is to be created for the reservation then you might see "Transactions[+1] : Type".

Some "fields" aren't necessarily data fields, for instance a "Unit Type" may be shown that specifies the type of site requested. This is a temporary value that's used when selecting a site, but will not be saved with the reservation. Another example of a temporary value would be "Number of sites requested" -- this is used to determine how many linked reservations will actually need to be created from this request.

Editing Fields

If you see obvious mistakes in a field value, you can edit the value before saving the request. Just click on the value twice (once to highlight it and again to enter editing mode). Some values may be drop-down lists instead of editable text, just as they would be on other dialogs. For instance the Rig Type would be a drop-down pick list.

Only true data fields can be edited -- temporary values as mentioned above and other pseudo-fields cannot be edited.

Close (skip for now)

This will simply close this window and go back to the list of requests, without processing (saving) this request.

Note that any editing done to field values *will* be saved as long as you're still processing the list of requests, so the changes will be remembered if you come back here to View / Process the request. However any changes not saved as a real reservation will be lost if you close all the way out of the Retrieve Online Reservations dialog.

Selecting a Site

Before saving the request, you will usually want to assign a site (or sites) for the reservation using the **Select a Site** button. This function will let you select a site using the same "Assign or Change Site" dialog used elsewhere in Campground Master. You may notice a couple minor differences, however. Since this is not a real reservation yet, everything in the site selection dialog will be disabled except for the controls necessary to select a site. For instance, you can't use "Guarantee", or view customer details. Also note that any preferences selected or changed here will not show up when you return to the request details.

If the request specified a particular site already (either by specific site name or because only one site matches the online site data field designation of ID/name/class/etc.) , then it will be assigned automatically and you don't have to select one at all. However you could change the site if needed -- it will ask if you want to start over and select a new site if a site has already been selected.

If you have set up Site data fields like "Site_Online_Email_Type" and the request specifies one of the designated types (instead of a specific site), then the site selection dialog will only show sites of that type and "Requested Type" will be shown in the drop-down list where "All Site Types" is usually shown. You can override this if necessary to select different sites, by changing the "Requested Type" selection to something else. Obviously this is not recommended under normal circumstances, since you could be giving the customer a site they don't want.

If the request was for multiple sites (according to the "Number of sites requested" value, if present), then you must select exactly that many sites while in the site selection dialog. It will not allow you to save the selected sites if the quantity is not correct -- they must all be selected at the same time. Note that if it's for multiple sites, it will actually create multiple reservations as it always does for multiple sites, and they will all be linked as synchronized reservations.

Send an E-mail

This function can be used if you need to send the customer an E-mail to ask for more information, or perhaps reject the request. This will open an E-mail window where you can enter your message. However if you intend to accept the request and just need to send an E-mail confirmation, you should use <u>Save & Continue to Details</u>, and do <u>Quote/Confirmation</u> from there (see below).

Save ... Done

If everything looks OK on the request and you don't need to do anything more than save it as a real reservation now, click this button. Some validation will be done, and if everything is OK then it will be saved.

Entering a Deposit

If you use a 3rd-party online service, then the actual deposit might be received and processed by them already. If you have appropriate parsing rules set up, the Transaction for this deposit will be created automatically, so no further handling would be needed.

If you retrieve credit card information from the request and need to process the deposit locally, then you will need to do that manually. First you will use the <u>Save & Continue to Details</u> function (covered below), which will take you to Reservation Details. From there you will go to <u>New/Edit Transactions</u> and enter the deposit just as you would for a phone reservation. If you're handling credit card charges in Campground Master, you would do the credit card processing there as well. Note that it helps if you have the parsing rules extract the credit card information into the Guarantee Info field for the reservation, so it will be used automatically when you go to enter the deposit transaction.

Sending a Confirmation

Again, if you're using a 3rd-party online service, then that service probably already sends a confirmation to your customer. If you're taking requests from your own web site, however, you probably want to send them an E-mail confirmation now. To do this you will first select <u>Save & Continue to Details</u>, enter the deposit if needed, then use the <u>Quote/Confirmation</u> function to send the E-mail confirmation (just like when you take a phone reservation).

Save & Continue to Details

If you're ready to save the request but want to make other adjustments, or perhaps need to process a credit card deposit or send a confirmation E-mail, then select this option. The request will be saved as a real reservation and you will be shown the Reservation Details. You can do anything there that you would normally do after creating a new reservation. Once you're done, you will be taken back to the list of requests.   (If you need to go back and do more with it, you can get to it easily from the list of requests by using the View / Process function again.)

Save as an Inquiry only

There may be times when you need more information from the customer before saving the request. Use this function to save the request with the current information as an "Inquiry" reservation. Then when you get the information you need, you can locate the inquiry through the Non-Reserved tab view to edit it and change it to a "Pending" or "Guaranteed" request.

Note: If you want to request the needed information by E-mail , it's easiest to use the Send and E-mail function before saving it as an inquiry, since you won't be able to come back into here after you save the request as an inquiry. Otherwise you would need to go to Reservation Details, then Customer Details, then click on the E-mail link there to send an E-mail.

Duplicate Customers

After you Save a request, Campground Master will check for any similar customers in the database (by last name and zip/postal code). If it finds a potential match, it will ask if you want to merge them to avoid duplicate customer entries. If you do, then the Merge dialog will be shown so you can verify the information and choose which customer record you want to keep. The one you don't keep will be deleted and all of its reservations and transactions will be transferred to the one you do keep -- so you can either keep the original one or the new one, depending on which one has the more accurate or complete information.

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