1 Version 3.0 Release Notes

Version 3.0 is a significant update from 2.7.4. This document contains all notable changes since 2.7.4.

To upgrade to this release, you only need to install it over your current version. There is no need to uninstall the previous version. All previous versions will be upgraded automatically -- you do not need to install previous upgrades before this one, and all of your data and settings will be retained (except for the "demo" database file, which will be replaced with a new version).

Networking Note: Be sure that all workstations are upgraded at the same time (shut down all workstations, upgrade all of them, then restart them one by one starting with the master workstation).

Note: You cannot go back to using your database with a version of Campground Master once you start using this version, due to upgrades that are automatically made to the database. Be sure you make a backup of the database before installing the new version, in case you have any trouble.

Also Note: When you install the new version, the "**demo**" database (demo.prk) will be overwritten with a new version of the sample database. If you have been working with the sample database and want to save the changes you've made, then you need to load it and then use File | Save As to save it to a different name before installing the new version of the software.

Version 2.9 release changes:

- **Major changes** -- Major new additions or feature changes
- **Other changes** -- Other changes since 2.7.4.
- **Fixes implemented** -- Bugs fixed since the 2.7.4 version release.

2 Major Changes

Major changes in 2.9 beta 2:

- Added E-mail confirmation feature (see separate section for details)

Major changes in 2.9 beta 3:

- Added zip code / postal code lookup function to New Reservation, Customer Details, and Vendor Details dialogs (see separate section for details).
- Include customer information to reservation record "Print" function from Reservation Details dialog.

Major changes in 2.9 beta 7:

- Added an option to "Show # Available instead of # Occupied" in the Occupancy report, so it can be used as an Availability report.
- Added a "Qty" field in New Reservation -- after optionally selecting a site type and other preferences, enter a Qty and click Add Selection(s) to automatically pick the requested number of sites and add them as synchronized reservations. Note: This option must be enabled through Maintenance / Program Options / Reservations before the Qty field will be available.
- Completely overhauled the way linked reservations are handled, to allow combined billing for non-synchronized reservations, easy creation of linked non-synchronized reservations (with or without combined billing), multi-level linking, and more (see separate section for details).
- Added Reservation "Schedules" support for intra-day reservation schedules. These can be set up for any type of periods within a day, such as AM / PM (2 periods/day), hourly, 15-minute periods, or whatever is needed (see separate section for details).

Changes in 2.9 beta 9:

- Allow specifying how multiple added sites are linked when the new "Qty" field is entered in New Reservations (as described above), using a prefix of '=', '#', or '>'. For instance, enter "#5" to automatically select 5 sites and link them together as non-synchronized. (The default is to make them synchronized if no prefix is used.)

Changes in 2.9 beta 10:

- Allow linking Unassigned reservations to each other (and adding synchronized, etc.)
- Allow creating multiple unassigned reservations at once, using the Qty field as in beta 9 above (enter a Qty and click "Done" without adding sites).

Changes in 2.9 beta 11:

- Added an option to show # of sites (or percentage) available on the Rack, for each day/period or for each site type. They can be shown as an extra row under each date, or as pop-up tips when you put the mouse over the date and/or site type. This is disabled by default (because it can be slow for very large parks). To enable these options, click the Options button on the Rack tab view. Note that the # available each day will be according to which site type or class is being shown on the Rack (e.g. if you select Cabins from the site types list, it will only show how many cabins are available each day).

Changes in 2.9 beta 14:

- Added "Availability", "Arrivals", and "Departures" statistics reports (Reports menu).
- Added "Tip of the Day" messages when the program starts, and functions under Help to enable/disable tips or show tips now.
- Skip the warning prompt about adding transactions to a reservation that's not the linked master -- always add to the linked master by default. The warning prompt can be re-enabled through Program Options. Also, transactions for meter readings and monthly billing will only be allowed on the linked master unless this prompt is enabled.
- Added "Receipts by Category" Quick-Report on the Transactions tab. This will report payment transactions like Receipts by Payment Method, but will interpolate the proper Category from the charges the payment were applied to and group amounts accordingly. For deposits entered before any charges, an "Uncategorized" group is used. Options allow reporting deposits at the time of posting (using this uncategorized group), and/or reporting as of the date the deposit was applied (when it will know the actual category).
- Keep the Rack and Map views in sync (when the From or To date is changed on one, change it on the other also). This can be disabled through Program Options / Reservations.

3 Other Changes

Changes in 2.9 beta 7:

- Allow CVV values to be entered even if credit card processing is not being done in the program.
- Map Setup - If the map file not in correct database folder, offer to copy it. If not the correct format, explain how to change it.

Changes in 2.9 beta 6:

- Allow automatic multi-tier electric/water/gas meter rates, using "Applies if >=" and "Applies if <=" fields.

Changes in 2.9 beta 7:

- Use a new memory management core internally to improve memory usage and speed.
- Changed "Site Filtering" on Find Resveration to a "Reservation Filtering", to allow more flexibility
- Added options on Reservation Filter to include linked reservations -- so a reservation can be included if any reservations linked to it match the filter settings, even if it doesn't match the filter itself.
- Use a larger dialog for Edit Rate Definition (if screen resolution allows).
- When in the Customer Details, save the last name searched for when doing Find followed by Add New (so it doesn't have to be re-typed to add the customer).
- Changed the wording for "native font" to "fixed-pitch font", for the 3" receipt printer formats
- Added font size settings for 3" receipt printer (both fixed-picth and normal) -- so it doesn't use size of 7 for the fixed-pitch font.
- Added font name setting for non-fixed-pitch, instead of always using "Times New Roman"
- Automatic database backups are now done on client workstations too, not just the server.
- If the database is corrupt or not found on startup, check for an auto-backup within the past 15 days, and offer to auto-restore form it (with minimal prompts).
- Disable the preferances checkboxes and "More Prefs" button on the New Resvervation dialog unless "Use prefs" is checked.
- Window Tags can now be printed for selected linked reservationsinstead of only for the main one -- in Transactions, select a reservation from the list at the top, then print the Window Tag -- it will be printed with that Site number on it (and with the appropriate dates, etc.).

Changes in 2.9 beta 10:

- Allow Maintenance / Network Functions / Show IP Address and Network Setup for any level user (but don't allow changes unless administrator).
- Removed all "Concurrent" terminology (use "Linked" or "Synchronized" as appropriate).

- When changing the customer for a reservation, give the option of either changing it for all synchronized reservations too (keep synchronized), or only change the one reservation and make it non-synchronized.

- Allow changing the paid-thru date on Transactions (like it used to be), by clicking on the paid-through date in the reservation table.

- Added "End text" field to Periods so that a note can be added to receipts for scheduled/hourly reservations, such as "Due in by 2PM". (Set this by going through Maintenance / Park Setup / Schedules, then select each Period defined and Edit it).

Changes in 2.9 beta 11:

- Added an option to select which Park record's information is used on receipts when there is no Site information (Customer or Unbound/POS receipts, envelopes, etc). This is set for each workstation (as are all Printing Options), so it can be according to where the workstation is located.

- Added an option under Network Setup / Diagnostics to log all network activity. This can be enabled for troubleshooting network problems, but should normally be left disabled (for speed).

- When splitting a reservation, there is now an option to link the two split halves (either as sub-members or non-synchronized), or to leave them unlinked. Linking as sub-members allows billing to still be combined after they're split, even if they're moved to a different site, which was not possible before.

- The pop-up tip for the date row on the Rack now appears underneath the date row instead of on top of it. (Only an issue if you're not showing the entire date already.)

Changes in 2.9 beta 14:

- Check for log changes to be re-applied when a Save As is done (to help when restoring from a backup).

- Double-clicking on a Memorized report in the Transaction tab Summary Options will do a View Report, not Load Report. (Auto-close the Summary Options and show the report immediately.)

- Added a "Same category" checkbox on the P.O.S. sales entry for Other Charges -- when checked, it will remember the category selected from one entry to the next.

- Disable the "Payment Method" selection on the Transactions dialog by default (since it's selectable when a Payment is done anyway). This can be re-enabled through Program Options if desired.

- Allow adding Memo transactions to printed receipts (a new checkbox for this option will appear on the Memo entry dialog). Also fixed so memos can be added to POS receipts after the initial session.

- Added separate Access Level settings for allowing transaction date and times to be changed (so it's not just restricted to administrators).

- Added an option to show the quantity details on transaction descriptions (like "3 sites x 2"). Enabled by default (same as previous functionality), but can be disabled to make auto-rates less confusing when changes are made to a reservation.

- Changed backups function so that if it's not backing up to a floppy, it will do the compression to a temporary file first and then use a Windows call to copy that to the chosen destination. This may fix issues with using Iomega Zip drives and may also allow it to work directly with CD-RW drives.

- Made internal changes to reduce memory usage by 15% (enable more data in RAM before it starts slowing down).

- In the Quick-Info window and Reservation Details, when showing linked reservations, add an asterisk (*) in front of the currently-viewed reservation.

- Add the first night, last night and customer name to linked reservation lines if it's different than the one currently being viewed (in Quick-Info and Reservation Details).

- On receipts, show additional sites at the bottom instead of at the top or in a "clump" that can get truncated. These are shown on separate lines, and will include the dates as well as check in/out times if different than the main reservation (the one at the top).

Changes in 2.9 beta 15:

- Added POS option to only auto-print receipt (upon payment) if the payment was made with a credit card.

Changes in 2.9 beta 16:

- Memo transactions are shown in blue or red text - blue for memos printed on receipts, red for memos that are not printed.

4 Fixes implemented

Fixes in 2.9 beta 2:

- Fixed the Notice text for Ticket Form receipts. Was showing "\n" instead of going to a new line like it should, if line breaks were used.

Fixes in 2.9 beta 3:

- Fixed Program Options / AutoRates options -- "When day pass created" option was not being saved (the When Checking Rates flag was being saved in its place).

Fixes in 2.9 beta 4:

- Fixed an internal site indexing issue, to avoid wasted memory and fix some cases of very slow database loading.

Fixes in 2.9 beta 5:

- Fixed a couple sorting problems with the ETA field (sort by date first, then ETA, and use the Pick List order so for example 1 PM doesn't sort above 10 AM.
- Fixed the "Check In!" button on New Reservation so it has a shortcut (Alt-I).
- Fixed Payment Entry so the credit card information from the guarantee info for that specific reservation is used before customer transactions from previous reservations are checked.
- Fixed Payment Entry and Guarantee Info dialogs so it will save the blanked-out credit card information if nothing new is entered (eg. after a Redo Swipe).

Fixes in 2.9 beta 6:

- Fixed Networking so if a reservation is deleted on another workstation, it doesn't cause the Rack to reset to today.
- Fixed Networking so it doesn't try to connect/disconnect twice when getting full database refresh (this was causing the ID-already-in-use error).
- Fixed Alt- hotkeys in Find Reservation dialog (avoid duplicates).
- Fixed adding New Rate Definition so the checkboxes default to the appropriate settings depending on the Rate Type.

Fixes in 2.9 beta 7:

- Made a change that might fix some print-preview lockup issues (actual errors not reproducible, but the code change prevents a potential problem).
- Fixed so inactive reservations aren't shown as conflicting on quick-info window.
- Fixed monthly billing so it includes Owner reservations when option selected to do so.
- Fixed envelope printing crash if the site record did not have a park assigned to it.

- Fixed receipt printing crash if a credit card receipt format is used to print a normal receipt.
- Fixed the bottom text on 3" printer receipts to center properly (based on # columns) if using the fixed pitch format.
- Fixed Cash Drawer dialog setup example for the font name to "control" instead of "command".
- Fixed lock-up/crash problem on 3" receipt printer fixed-text centering if the text is more than 40 characters wide (e.g. long park names).
- Fixed some issues with using the "Add a guest" function from within the New Reservation dialog (e.g. right-clicking on an existing reservations).
- Fixed New Reservation dialog to report conflicts properly if dates are changed when adding synchronized reservations.
- Fixed Find Reservation to sort by the correct columns depending on the type of search.
- Fixed so when the customer is changed for reservation, it does NOT copy # adults/children/vehicles/etc. from that customer (assume the reservation has already been adjusted as needed).
- Fixed New Reservation dialog so that when a rig size entered and then "Use Preferences" checked, it changes the sites available properly.
- Fixed so when Add New Customer / Find is performed, it saves & uses the Last Name searched so you don't have to re-type it.

Fixes in 2.9 beta 8 & 9:

- Fixed several critical bugs in the beta 7 release.
- Fixed Reports / Reservation Receipts function to properly print all receipts when Print Preview is not used.
- Added some preventative validation for receipt printing & print preview (might solve some errors reported that were not specifically reproduced).

Fixes in 2.9 beta 10:

- Fixed New Reservation to pre-check for conflicts when adding synchronized reservations and the date is changed.
- Don't allow changing the customer of a reservation that's a sub-member of another one (all sub-members must have the same customer, same as synchronized).
- When changing the customer of a reservation, automatically change the customer of all sub-member reservations also.
- Fixed a few beta bugs in the Select Rates / Auto-rates calculations.
- Fixed Print Preview to prevent operating the originating dialog while previewing (avoids a potential crash).
- Fixed Monthly Billing for the new linked reservations, and also show site number for each charge if

not handling synchronized separately.

- Fixed receipts to show appropriate periods instead of check in/out times when the main reservation is a Scheduled/hourly type.

Fixes in 2.9 beta 11:

- Fixed a couple networking issues that can prevent connection in large-database situations or when a lot of changes need to be synchronized.
- Don't allow a network connection if the Windows date format is different (e.g. m/d/y vs. d/m/y in Windows' Regional Settings), since this prevents networking form working properly.
- When saving the database, it now writes to a temporary file first, and then only replaces the original file if that's successful. This should help prevent corrupt databases caused by computer crashes or other program lock-ups.

Fixes in 2.9 beta 12:

- Fixed new Reservation dialog so the currently selected (or <NEW>) site isn't scrolled out of view when the preferences or rig size is changed.
- Fixed so synchronized reservations are all checked out together.

Fixes in 2.9 beta 14:

- Fixed some jumping-to-top issues with the New Reservation grid.
- Fixed a crash when New Reservation is closed while the cursor is in a date field.
- Fixed the New Reservation dialog so it doesn't check Blocked-To when the Quick-Pick list is used.
- Fixed New Reservations to allow changing the First Night when the 'master' reservation is already checked in but the current one is not.
- Fixed the # available numbers on the Rack to update whenever the Rack is refreshed.
- Fixed so the # available numbers take unassigned reservations into account.
- Fixed credit card entry to allow 4-digit CID numbers for American Express
- Fixed so that "hidden" taxes are added on the POS sales entry when a payment is entered, to get transactions in the proper order.
- Fixed Edit Rates so min/max units for meter readings can be entered without "Ask for meter reading" checked.
- Fixed New Reservation so if a Site Type or Class is selected that doesn't correspond to the current Resv Type (based on schedules), the Resv Type will automatically be changed and the correct sites will be shown.
- Fixed the Transactions and POS dialogs so the Shift column isn't shown (when Details is checked) unless Shifts are enabled.

Fixes in 2.9 beta 15:

- Fixed POS option for automatically printing receipt upon payment entry (wasn't working unless also auto-closing the POS dialog).
- Fixed the Reservation Receipts (Batch) report to show Periods if schedules are used.
- Fixed Change-Customer so that if transaction are move, they stay in the same order (instead of being reversed)
- Fixed to allow changing site assignments for a conflicting reservation (it was reporting an error due to the existing conflict)
- Fixed a crash when using the Swap sites function
- Fixed the New Reservation grid to start on the first night selected (it was only making sure the first night is visible, not shifting it over to the first column).
- Fixed so that when a reservation is the transaction master and its linking type is changed such that it's no longer the transaction master, it will move all transactions to the new transaction master. This is necessary to keep all transactions on the master reservation, and to avoid duplicating charges.
- Fixed a problem with setting Paid-thru or Charged-thru periods to #0000000 instead of blank (for non-scheduled reservations), which caused <bad link> errors. To clean up any previous remnants of this bug, use the Maintenance / Database Maintenance / Repair <bad links> function.
- Test database file for being read-only, and show an appropriate error message.

Fixes in 2.9 beta 16:

- Fixed full-page receipts so the date doesn't cause a gap in the header box.
- Fixed ICVerify credit card processing to allow new "B" responses (any response other than "N" is assumed to be authorized).
- Fixed the printed title of new Receipts by Category report, and fixed so the settings are saved with memorized reports.

5 E-mail Confirmations

Confirmations can be sent to customers via E-mail if the customer's E-mail address is in the database (see Customer Details). To enable E-mail confirmations, the appropriate settings need to be configured first (in Maintenance / Online Setup / SMTP Setup). These settings are similar to configuring E-mail programs. If you have any questions about the settings in SMTP Setup, please contact your internet provider.

To use the E-mail confirmation function, Campground Master must be able to access an SMTP mail server via the internet. It will not work directly with services such as America Online, or with web-based E-mail like Hotmail or Yahoo. However if there is an SMTP server available to you, for instance though your web site provider, then that can be used.

Once the E-mail configuration is done, then a new button will appear on the Transactions dialog for any reservation that's not yet checked in (it assumes there's no need for a confirmation once they're checked in). Likewise, it will appear when you use Quote/Confirmation from the Reservation Details dialog.

You can also configure the E-mail confirmation letter text and other options similar to the printed confirmation letters. This configuration is also done through Maintenance / Online Setup.

You can also send E-mail messages to customers using the blue E-mail "link" on Customer Details (like before, but now it uses the built in E-mailing instead of opening the default E-mail program in Windows).

Note that it does NOT keep any record of E-mails sent (we're still debating whether it's worth the database overhead or development effort). Instead, you can set a BCC address in the SMTP settings so that all outgoing E-mails are also sent to another account (e.g. your own E-mail account) for your records.

6 Zip-code Lookup

The automatic zip-code lookup functionality in Campground Master helps speed customer data input.

It includes all codes for both U.S. Zip and Canada postal codes. To use the automatic lookup, just type the zip/postal code in the City field when entering date, and when you press **Tab** or **Enter** the program will fill in the city, state, zip and country automatically and instantaneously. (You can also enter it in the Zip field instead, and it will do the lookup if the city and state have not been entered yet -- but using the City field is quicker than skipping to the Zip field.)

Note that there is no need to enter the spaces or capitalize the letters in Canadian codes, it will do that automatically. You can also use the Zip+4 format for U.S. codes if you like.

See Maintenance / Program Options / Zip Codes if you want to change the settings (use upper case, skip the country, or disable the lookup function.).

7 Linked Reservations (Portfolios)

Overview

Reservation linking is handled through a system called "Portfolios". This is mostly an internal organization term -- as a user, you see the linkage as a tree structure similar to file folders on the computer. Any reservation can own any number of portfolios (folders), each of which can contain any number of reservations -- which can in turn own other portfolios. Technically there is no limitation to the number of levels or complication of the structure, but in practice you're likely to only use 1 or 2 levels.

In addition to the multi-level linkage structure, each portfolio (set of reservations) can be one of 3 types. Note the distinctions between these types -- it's important in know which type to use for different situations:

- **Synchronized** -- As before, the reservations keep their dates and status in sync automatically, and are combined for billing purposes.

- **Non-synchronized** -- As with "unsynchronized" before, reservations linked this way can have different dates and have separate transactions for billing.

- **Sub-member** -- This is a new type of linkage. Besides being logically a sub-member of the owner reservation, transactions will still be combined with the owner. However, it's not synchronized with the portfolio owner so the dates do not have to be the same as the owner reservation.

Instead of showing a straight list of linked reservations in Reservation Details, a tree-structure list is used to indicate the portfolio levels and also the type of linkage for each reservation. These symbols are used to indicate the link relationship with the owner reservation (the portfolio type):

= Synchronized
 # Non-synchronized
> Sub-member

Note that in the tree structure, the top-level reservation won't have an indicator, because it's not a member of any higher portfolio. This top-level reservation is considered the "Master" of the linked reservations.

In some cases, an asterisk (*****) will be shown in front of one of the reservations. This simply indicates which one you're currently viewing.

Here is an example diagram of a fairly complex set of linked reservations, as it would appear in the drop-down list on Reservation Details or on the Quick-info window:

```
RV 1 [Linked master]
  = RV 2 [synchronized with RV 1]
      > Stall 1 [sub-member of RV 2]
  = RV 3 [synchronized with RV 1]
  # RV 4 [not synchronized]
      > Boat slip 1 [sub-member of RV 4]
      > Kayak 1  [sub-member of RV 4]
  # RV 5 [not synchronized]
```

I'm sure this looks confusing at first, but it will make sense once you learn the symbols and notice the spacing to indicate levels/ownership. Also note that the relationships are clearly detailed in case it's not obvious from the structure.

In portfolio terms, there are 4 portfolios involved:

- RV 1 owns 2 portfolios -- a Synchronized portfolio containing RV 2 and RV 3, and a non-synchronized portfolio containing RV 4 ad RV 5.
- RV 2 owns 1 portfolio -- a Sub-member portfolio containing Stall 1
- RV 4 owns 1 portfolio -- a Sub-member portfolio containing Boat slip 1 and Kayak 1

However, you can pretty much forget about "portfolios" now. While that's the way it's stored and managed internally, the only thing you're concerned with is their "link relationships", which are already detailed in the tree-structured list.

Some important points:

- Since all synchronized and sub-member reservations are combined for billing (and any synchronized or sub-members of those, etc. all combined with their top-level owner), the reservation for RV 1 will also contain all transactions for RV 2, RV 3, and Stall 1. However, non-synchronized reservations are considered separate "sets" or "top-level reservations" for billing -- so the reservation for RV 4 will include transactions for Boat slip 1 and Kayak 1, and RV 5 will only contain transactions for itself. Thus by using appropriate link types, you can completely control which reservations are combined for billing.

- Only synchronized reservations will maintain identical dates and status. Thus RV 1, 2, and 3 will stay synchronized if a change is made (assuming the appropriate answers are given when prompted to keep them synchronized). But changes to any of the others will only affect that reservation.

- There are no date restrictions for sub-members (for instance it's not like a Guest reservation where the guest's stay can't be outside the host) -- so by using sub-member linking it's even possible to combine billing for separate stays (even on the same site!) for the same customer.

- Even Guest reservations can have sub-member reservations linked to it -- so for instance a Guest can rent a stall or canoe, which can be combined on the guest's bill and not affect the host reservation.

- Any synchronized link can be changed to non-synchronized (e.g. to separate the billing or change the customer) or a sub-member (to change dates independently while keeping the billing combined). However it cannot be changed back to synchronized (since there could be a conflict of dates, etc., this could get complicated). For the most part, there's no reason to re-synchronize it, since Sub-members have most of the same advantages.

- Any non-synchronized or sub-member link can be changed back and forth, so you can combine or separate billing at any time (but be sure to go back and re-calculate charges appropriately if you don't have auto-recalculation enabled).

Creating Linked Reservations

There are some key changes in the New Reservation dialog which allow flexible linking when creating reservations.

In particular, notice the two check-boxes next to the Add Selection(s) button. For a single site/reservation, they have no affect. However once a site is added, the checks in these boxes determine how subsequent reservations are linked to the previous one (or to be specific, how it's linked to the reservation currently selected in the Site(s) added list).

Also note that the Site(s) Added list is a drop-down box, not just text. This allows you to view the currently added sites/reservations regardless of how many there are, and it will be a tree structure with indicators as described above. Additionally, you can select any single site and use the Delete button to remove just that site from the list (or use Clear All as before). Most importantly, you can select any site in the list after adding it to change its dates, preferences, etc. and add linked sites to it (e.g. sub-members). This allows a complete structure to be created as in the example above, all while in the New Reservation dialog.

The "Synchronize with" box is checked by default, which means it will operate exactly as before if you add multiple sites using Quick Pick or double-clicking on the grid. They will all be made synchronized reservations. (For convenience, the synchronized sites are also listing in the same line as the owner so you don't have to drop down the list to see the first few synchronized sites).

To make a Sub-member reservation, make sure the desired reservation is selected in the Site(s) Added list, check the "Sub-member of" box, and adjust the dates if needed. Then add the site to be a sub-member (using Quick-Pick, double-click, or the Add Selection(s) button after selecting a site in the grid).

To make a Non-synchronized site for separate billing, un-check both of the boxes (so it's not synchronized or a sub-member), and then add the site as above.

Important: Any time the "Synchronize with:" box is checked, any changes to the dates, reservation type, or preferences will affect the currently selected (shown) site in Site(s) Added, and of course any of those synchronized with it. Thus it's a method to alter sites already added, but you also need to be careful to avoid altering a site when you didn't mean to.

Once all of the sites have been added as needed, save the reservation as usual and all of the appropriately linked reservations will be created. Note that if you use buttons like "Check In" or "Guarantee", this will only affect the top-level reservation or any synchronized with it. Sub-members and non-synchronized reservations will remain as Pending since their status does not stay synchronized with their owners.

Example: To create the reservation structure illustrated earlier, you would follow these steps after entering New Reservation:

1. Select the dates desired for RV 1 (and 2 and 3)
2. Add RV 1
3. Add RV 2 (note that "Synchronize with:" is already checked)
4. Add RV 3
5. Uncheck "Synchronize with" (prepare to add non-synchronized reservations, linked to RV 1, which is still selected)
6. Change the dates if needed for RV 4 (note that you must uncheck "Synchronize with" *before* changing dates, or else it would affect the RV 1/2/3 sites)
7. Add RV 4 (note that RV 4 will now be selected in the Site(s) Added list)
8. Uncheck "Synchronize with" again (it's automatically checked each time you add a site, so subsequent synchronized sites can be added easily -- but we don't't want that)
9. Add RV 5 (RV 5 will now be selected in the list) Also note that it added RV 5 as a non-synchronized site with RV 1 as the owner, even though RV 4 was selected. Since there's no reason to have multiple levels of non-synchronized sites, it simplifies the structure automatically. The same would be true of Synchronized sites added to each other.
10. Select RV 2 in the Site(s) Added list
11. Check "Sub-member of" (prepare to add the Stall 1 to RV 2)
12. Change the dates if needed
13. Add Stall 1
14. Select RV 4 in the Site(s) Added list
15. Check "Sub-member of" (prepare to add the boat slip and kayak to RV 4)
16. Change dates if necessary
17. Add Boat slip 1
18. Select RV 4 in the Site(s) Added list again
19. Check "Sub-member of" again
20. Change dates if necessary
21. Add Kayak 1
22. Done (after entering customer information of course)

Note that you can easily review any of the additions by selecting it from the Site(s) Added list. The dates, etc. will be changed to match that site/reservation, and the grid will be moved if necessary to show the selected site (shown as <new> in the grid as usual).

Managing Linked Reservations

Even though you have control of the linking when you first make a reservation, there will often be the need to change things. For instance, Group reservations should probably still be made as synchronized reservations initially (to keep dates, status, etc. combined at first), but once the members of the group arrive you may need to separate them (change the customer and use separate billing). You may also need to add additional sub-members to individuals in the group.

Some of this is similar to previous versions. For instance you can change the customer from Reservation Details, and if it's a Synchronized reservation it will automatically be changed to Non-synchronized to separate the billing.

In Reservation Details, you also still have the list of linked reservations (this time with the tree structure), and a View function to open the selected reservation in a new Reservation Details dialog. However there are now 3 separate "Add..." buttons instead of just one. Each button will add reservations with linkages of the appropriate type. Note that it will be linking them to the reservation you're currently viewing in Reservation Details, NOT the one currently selected in the list! Also note that once you're in the Add function (which is the same as creating New Reservations), you can again add multiple levels of reservations.

Right-click functions

You can also perform link functions directly from the right-click menu on the Rack and other tab views. There is a Linked Reservations sub-menu, which allows adding the 3 different types of linked reservations mentioned above, plus 2 functions that allow changing the way the selected reservation is linked to its owner. (Some of these may be disabled depending on the current link status or type of reservation -- for instance, Synchronized reservations cannot be added to Guest reservations.) The options to change the linkage type can be used to combine or separate billing (change a sub-member to non-synchronized, or vice verse), or to change a synchronized reservation to a sub-member (combined billing) or non-synchronized (separate billing) so that the dates or status can be changed separately.

Transactions and Auto-Rates

The changes in linked reservation handling also necessitated appropriate changes in the way transactions are entered and maintained. In particular, a single collection of linked reservations can contain some that are billed separately and some combined, and even the combined ones can have different dates.

Key changes in the Transactions dialog (e.g. New / Edit Transactions):

- The Transaction dialog contains a list of all reservations that will be billed together, with their dates (first, last, charged-thru and paid-thru).
- Since the reservations listed in Transactions might not be synchronized, the dates cannot be changed directly. Reservation Details must be used. to make date changes.
- To view Reservation Details for any of the reservations listed in Transactions (if more than one), select that reservation before clicking the Reservation Details button.
- Select Rates can only operate on one set of synchronized reservations at a time (it can't handle reservations with different dates). Therefore to select rates when more than one group of synchronized reservations are involved, you may need to do it in separate groups. For each one, select one of the reservations in the list before clicking Select Rates.
- If Auto-Rates is enabled, it will calculate for ALL reservations appropriately -- there is no need to do it in multiple groups as with Select Rates.
- As a "bonus", you're now able to print Window Tags for individual sites/reservations -- just select the

site in the list before printing a window tag.

- Any other receipt formats will print using the "master" reservation's site, but will also include as many of the linked sites as will fit in the designated space on the receipt. (This is an option that can be disabled in File / Printing Options / Receipts)

Auto-rates notes

The auto-rates calculations will always include charges for all appropriate linked reservations (synchronized and sub-members, but not non-synchronized). These will be added to the "top-level" reservation, just as they used to be added to the "synchronized master". Also note that if auto-recalc is enabled (to automatically recalculate whenever a change is made), ALL linked reservations are recalculated whenever a linkage change is made. For instance if a reservation is changed from Synchronized to Non-synchronized, that may result in charges being moved around to the new top-level reservation (for each non-synchronized set).

Another important thing to note is that if you have it set up to auto-add charges when they check in, this will actually happen when the first of any linked reservation (with combined billing) is checked in, and it will add charges for ALL appropriate linked reservations. So for instance if a sub-member is checked in first, charges for that reservation, it's owner, and any other synchronized or sub-member reservations in the tree will be added. Furthermore, they're always auto-added to the top-level/master reservation (and the Transaction dialog would automatically open for that reservation).

In our example above, lets say that Stall 1 was checked in before any of the others (their horse arrives early). Since it's in a sync'ed/sub billing group, the top-level reservation (RV 1) will be selected for billing, and charges for all combined-billing reservations will be added (RV 1, RV 2, RV 3, and Stall 1). While this is an unusual situation, it's probably appropriate -- presumably any synced or sub reservations are all for the same customer (it will only combine billing for the same customer anyway), you would expect them to pay for everything the first time they check in, even if they're not ready to use all of their sites yet. Remember, you can always change the linkage to create separate billings if needed.

8 Schedules / Hourly Reservations

Overview

A new feature called "Schedules" allows any number of different intra-day schedules to be set up, and reservations made for sites in periods such as hours, 15-minutes, half-days or whatever. You specify what periods are included in each day, and they don't even have to be the same length. For instance, you might set up a "Tours" schedule that only has the periods "10AM", "2PM", and "4PM". Periods are just "time slots" that take the place of days, for instance on the Rack view.

Once schedules are set up, then you can set up "Sites" to correspond to events or items to be reserved for each schedule. For instance, Sites can be tours, boats, training classes, or anything needed. Reservations are made in much the same way as for daily-type sites, except that you also specify a first and last "Period" along with the dates. You can also set Blocked date/period, and of course the charged-through and paid-through dates also have periods.

There are two things that determine what schedule is to be used for a reservation:

1. The Reservation Type. Each schedule is restricted to one or more reservation types that you define in the Pick Lists.
2. The Site. Each site must be assigned to a particular schedule.

A a quick example, you might set up an "Hourly" reservation type, an hourly Schedule with periods from 8AM to 6PM that is only used for Hourly reservation types, and a number of Sites like canoes and kayaks that are assigned to the hourly Schedule. Whenever you select that reservation type, the New Reservation dialog will change to allow date and period entry for the reservation. When a site type is selected on the Rack View that only includes sites of a particular schedule, then the Rack will change to show a cell for each period instead of each day. (Likewise, the Rack can ONLY show sites assigned to a single period at a time -- so your canoes and kayaks would not be shown on the Rack at the same time as your daily sites.)

There are three rules you need to keep in mind when setting up schedules:

1. Never select the same Reservation Type for more than one Schedule. (But one schedule can be used for more than one reservation type.)
2. Make sure the "Base type" for any Reservation Types for schedules are set to "Hourly".
3. Make sure all sites of the same Site Type are in the same Schedule. (But one schedule can be used for more than one site type.)

Setting up Schedules

There are a few steps required to enable schedules and set up the necessary tables.

First you need to enable some data fields (these are disabled by default to save database space, since most users don't need them).

<u>Enable the Period fields for Reservations:</u>

1. Go to Maintenance / Data Field Definitions / Reservation Fields.
2. Change each of the 5 period fields from Disabled to Enabled ("Resv_First_Period" through "Resv_Charged_Thru_Period").

<u>Enable the Schedule field for Sites:</u>

1. Go to Maintenance / Data Field Definitions / Site Fields.
2. Change the "Site_Schedule" field from Disabled to Enabled.

Set up one or more Reservation Types to use for scheduled reservations:

1. Go to Maintenance / Pick Lists / Reservation Types.
2. Check "Allow editing of fields".
3. Click "New Record".
4. Enter the information for this reservation type. Example:
   - Abbr: **Tour**
   - Normal Text: **Tours**
   - Base Type: **Hourly** (required)
   - Enabled: **Yes**

5. Repeat for any other types needed, Close when finished.

Add one or more Site Types for your scheduled sites.
(While this isn't technically essential, it allows you to view schedule sites of this type on the Rack, by selecting that site type.)

1. Go to Maintenance / Pick Lists / Site Types.
2. Check "Allow editing of fields".
3. Click "New Record".
4. Enter appropriate site type info (the Normal Text field is the most important, as that will appear in the drop-down pick-lists).
5. Repeat for any other site types. Again, you can have more than one site type for a particular kind of schedule (e.g. you could have different tour types all using the same tour schedule, or you might have canoes, kayaks, mules, etc. all on an hourly schedule), but be sure to set up at least one site type for each schedule.

Add one or more Schedule definitions:

1. Go to Maintenance / Park Setup / Schedules.
2. Click "New schedule definition".
3. Enter a name for it, which will primarily be used in a pick list so it should be fairly short. Example: "Wild tour"
4. Enter a Periods name, which will be used in various places where "days" or "nights" might be used such as rates definitions. For example, "Tours".
5. If most of the reservations for this kind of schedule last a certain length of time (periods) you can set a default # periods and block-to periods. Otherwise leave those fields blank.
6. Click "Resv Types" and select the type or types of reservations (as defined above) which can be used for this schedule.
7. For auto-rates, you can also specify extra periods to check. For instance if you have a 6-hour rate that's cheaper than 5 individual hours, you can set this to 2 or 3 so they're not charged too much for shorter reservations.
8. Add one or more Periods:
   a. Click Add New Period.
   b. Enter a Period name, which is used on the Rack, reports, etc. Keep it short!. Examples: 10AM, 8-10am, Eve., etc.
   c. Enter a Start time for this period. The primary use for this is so the New Reservation dialog can guess what the "current" period is.
   d. Optionally enter the # of minutes in the period. This is primarily for convenience, so it will automatically set the start time for the next period you enter.
   e. Optionally enter the "End text", which will be shown on receipts in place of a check-out time. Example: "Due back by 10PM", "through 2:59pm", etc.
   f. Repeat for any other periods in the day. Remember there's no need to cover all 24 hours, just the periods for which you need to make reservations.

Note: Schedule periods are assumed to never "overlap", just like days. In other words if you define an 8AM period and a 9AM period but enter 120 for their # minutes, the 120 minutes is essentially ignored. To make a 2-hour reservation on a schedule with periods each hour, and assuming that this is for a resource that must be returned before it can be used again (like a canoe), you would make the reservation for 2 periods (e.g. the 8AM and 9AM periods). On the other hand if you have a tour every 3 hours, where there is no problem with conflicts because it's not using a unique resource, then you would make the periods 3 hours apart.

Add the Sites for scheduled reservations:

1. Go to Maintenance / Park Setup / Sites
2. Click Add New
3. Enter the site details, and in particular be sure to select the appropriate Schedule form the drop-down list. Also be sure to select an appropriate Site Type.

At this point you should be able to see your schedules on the Rack -- just select the Site Type used for the scheduled sites, and those sites will be shown and the scheduled periods will show in addition to the dates in the column headers. There will be a column for each period defined in the schedule.

Rates for Scheduled Periods

Setting up rates for scheduled reservations is basically the same as for daily, weekly, or monthly rates.

There is one particular key to making a rate for scheduled periods -- in the drop-down for "Rate is per ___ (# of)", which normally shows Days, Weeks, Months and Years, you will see your schedule selections appear. The "Periods name" for each of your schedules will be added to the list. Once you select one of these new period names (e.g. "Tours"), then the rate is considered a scheduled-period rate instead of a daily rate.

In addition, you'll see a new field appear below the Discounts button/list, for Periods. This can be used to select which period or periods this rate applies to. Thus you can specify a different rate for each tour time, or different rates for morning vs. evening rentals, etc.

Likewise, instead of applying a rate to a range of days (Applies if >= ___ Days), it will apply to a range of periods (e.g. Applies if >= ___ Tours).

Auto-rates for periods work just like they do for daily rates. The only real difference is the setting for the number of extra Periods to check (which you specify for each schedule separately as mentioned above), instead of using the global setting for the number of extra Days to check.

Reminder -- All calculations for the number of periods is based on the list of periods you've defined, NOT on the number of hours or minutes. This includes rates calculations. For instance if you've defined hourly rates only for 8AM to 6PM, and someone rents for 6PM to 8AM the next day, then that's only 2 periods (the last period of the first day and the first period of the second day). This is where you might need to define a special rate for that 6PM period, to cover overnight rentals (or better yet, add a special "Overnight" period to the schedule to cover all of the time in between days).

Making Reservations for Scheduled Periods

You can make reservations for schedules just like you would for daily sites -- using double-click from the Rack (if a scheduled site type is selected so the periods are shown), or from the New Reservation icon or menu function.

The key is to select the appropriate Reservation Type from the drop-down on the New Reservation dialog -- once a type is selected that's assigned to a schedule, the dialog will convert to a period-based dialog, adding "Period" fields next to the dates and changing the mini-rack to show periods (and only sites that are set up for that schedule).

It's likely that many of your scheduled-period reservations will be for the same customer that also has a daily site rented. In this case, you probably want to link them together and combine their billing. To do this, you want to locate their main reservation first, and go to Reservation Details. Then use the "Add Sub" button to add a Sub-member reservation. Now select the sites, periods, etc. as usual (more than one if needed). When you're done and go to Transactions, you can use Auto-Calculate or Select Rates to add the charges for the new reservations.