1   Version 3.5 Release Notes

These release notes list all changes since the version 3.1 release. In addition, it contains a complete documentation section for the new Online Reservations functionality, which may be printed for your reference.

To upgrade to this release, you only need to install it over your current version. There is no need to uninstall the previous version. Any 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). It will make some automatic changes to your database to bring it up to date, so there may be a slightly longer delay the first time you open it.

Upgrades License Expiration Note: To use this version, your free-upgrades license must be current through **December, 2004**. To check your free-upgrades license expiration date, go to <u>View</u> / <u>Product Authorizations</u> and check the "Upgrades free through" date.

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).

Previous Versions Note: You cannot go back to using your database with a previous 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.

Demo Database 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 <u>File</u> | <u>Save As</u> to save it to a different name before installing the new version of the software.

Changes in this release:

- **Changes implemented** -- Changes since 3.1.

- **Fixes implemented** -- Bugs fixed since the 3.1 version release.

- **Online Reservations** -- Complete documentation on the new online reservation support.

2   Changes implemented

Changes that are significant new functionality or important to know about are noted in bold print.

- Added "Open previous database" option to the File menu, with the last 20 database names and locations. This can help recover the proper database for instance if Save As is use improperly.

- Added more fields to the On Site tab view (customer address fields, rig & car color fields).

- Show the proper column heading text for rig and car color, model, and license fields (according to the field names in Data Field Definitions)

- Added a "Test" function in the SMTP setup dialog, for easier setup.

- **Added a Site data validation check --** checks for duplicate site names or abbreviations, or blank full name, site type, site class or park selection. This check is done when starting up (until you tell it to skip the test), and any time changes are made to Site Details. These problems could have been in your database from the beginning if the sites were not set up completely, and should be fixed for proper functioning of the program. While you can skip this test when starting up, it won't allow you to edit or add sites with these errors without fixing the errors.

- Added an Access Level setting for whether a reservation can be made on a site if the site is unavailable for any of the reservation dates.

- Importing Reservations -- Allow more flexibility in the data format for dates and rig length (e.g. for Digital Rez and Campground Manager database imports). Also check for duplicate reservations when importing, import the Time-Made along with Date-made of found in the same field, and set the Check-In and Check-Out dates according to the actual reservation in and out dates.

- **Added columns for Deposits, Auto-charges and Auto-balance on some tab views**. These will auto-calculate the expected charges or balance after any existing deposit, if you have auto-rates enabled. Only shows this for future (pending/confirmed/guaranteed) reservations or checked-in reservations, except Owner reservations, checked-in Monthly reservations, or reservations with Auto-calculations disabled.

- E-mail confirmations, SMTP E-mail -- added options in SMTP setup to get the actual "from" address and name from the corresponding Park record for the reservation's site (or from the default park selected in Printing Options / Receipts, if sending E-mail other than a confirmation letter). This allows E-mails to come "from" the correct park in multiple-park setups.

- If no Taxes have been set up, the Tax button will not be shown on the Reservation Transactions dialog or Edit Rate Definition dialog.

- Added a link to the Quick-Start Guide in the Help menu, for new users.

- In the Network Setup, moved the "Request a full database when connected" option to the Diagnostics tab (to discourage setting the option unless required)

- Added Access Level settings for Viewing Customer Details and for Editing/Adding Customers.

- If a site is unavailable for certain dates, the Rack and Map pop-up tips for the unavailable days will show any Notes from its Site Details.

- When a processed credit card payment is selected in a Transactions or POS dialog, the "Delete

selected Item(s)" button changes to a "Void Selected CC Item" button (functionally the same, just clarification).

- **POS -- Allow selecting a customer or reservation for a POS sale directly from the POS dialog** (e.g. to add it on their account), and show the current one selected. Also if re-opening a POS transaction (e.g. from the Transactions tab view or Find Receipt function) that was for a reservation or customer originally, give the option of showing it in the POS dialog or the normal Transactions entry dialog -- so that returns can be handled better for these sales (through the POS dialog, which was not an option before).

- POS -- Receipts printed from the POS dialog will include the customer or reservation information if appropriate. It will not show other customer or reservation transactions or balance, only the POS transactions.

- POS -- Added the shortcut **Alt-.** (Alt key with the period key) to open the POS sales entry dialog, either from the main screen or from Reservation / Customer Transactions.

- POS -- Added some Access Level settings for allowing POS transactions from customer or reservation the transactions dialog, and for adding such transactions to the customer or reservation account without paying in full at the time of sale.

- Added an Access Level setting for allowing Unbound transactions to have a non-zero balance (defaults to Manager).

- Added Access Level settings for nearly all maintenance functions that were limited to Administrators.

- In the Transactions tab, More Filters -- added **Transactions filtering by Workstation(s)** for networked installations, so reports can be created specific to a workstation (to help in balancing the cash drawers, etc.)

- **In Reservation Details, added the buttons +1D, +1W, and +1M** (like in New Reservations) to make extending reservations easier.

- **Changed the Park Setup / Sites function to use a new dialog,** similar to the Rates Setup dialog -- it shows the site names, etc. in a list, with functions to Add, Edit, Insert, Move, Copy, Delete, and Add Multiple sites. This eliminates having to use Raw Data Tables for some of these functions. Adding or Editing a site will use the same Site Details as before, so this is actually an intermediate function added in between for easier sites manipulation.

- In Customer Details, if the last name is changed for an existing customer, warn about changing the customer's master record and suggest using "Change to a different customer" instead.

- Allow adding a new customer (instead of only selecting an existing one) for Customer Transactions or POS sales.

- Reservation Details - When changing the customer, don't automatically try to add one if the Find function is cancelled -- use the separate Add button in Find Customer if a new one is needed.

- **New Reservation - The Last Name field will be disabled if an existing customer is selected**, or when a new one is added and saved (due to going to Customer Details), to prevent accidental editing (and as a hint that you shouldn't change the information here if you're just wanting to pick a different customer). Allow selecting a different one using "Find / Change Customer", as well as adding a new one through the Find/Change Customer function.

- Added an option on the Rack to show "XXXX" instead of names for occupied sites, so you can print an availability chart without names.

- **Added "Sites" selection option for Rates**, so a rates can be defined for individual sites without creating a separate Site Type for each one.

- Put "or:" in front of Site Class and Site buttons in Edit Rate Definition, trying to make it more clear that they don't have to be set if Site Type is selective enough.

- Added an option to warn if a previous reservation hasn't been checked out, when checking a new reservation in. See Maintenance / Program Options / Prompts.

- Added an access level for whether to allow checking in a new reservation if the previous one is not checked out.

- Added an option to allow checked out reservations to count as "available" -- remove them from the Rack, don't count as a conflict if you make another reservation starting the same day. Primarily useful if you have people check out the same day (instead of the next morning) and need to make the site available for another person the same day.

- Added access levels for allowing Tax, Charge, Deposit, and Xfer transactions to be entered (manually).

- Changed File / Open and File / Save As so they never alter the default auto-open database (with one exception), to prevent problems of accidentally changing the default database. The only time the auto-open database is changed is the very first time Save As is used (e.g. if no auto-open database has been set yet).

- Added a function in Program Options / Database to change the auto-open database to the current database file. This is now the only way to override the default database once it's set.

- When a New Database is done, ask for the database name immediately and start using that as the default database, so Save As doesn't need be done, and it's saved where it should be (the Campground Master program folder).

- Added an auto-rates option to assume that canceled reservations should have no charges (all existing auto-charges refunded).

- Show a warning/verification prompt when making a reservation for a customer with the "Warning flag" set.

- Show more complete error information for online communications errors.

- Added some new access level settings for whether an operator can view quick-info pop-ups, and view transaction history.

- **Allow showing details for Receipts by Category transaction reports.** It will show the interpolated transaction details so you can see where the reported numbers are combing from (and go into the reservation's transactions, etc. to correct problems). Interpolated information is shown in grey to indicate that it's not "real" transactions, only calculated amounts derived from the transactions.

- Added a "Reports" item to the Transactions menu for convenience. This is the same as going to the Transactions tab view and Summary Options, but this makes it more obvious for beginning users.

- Online Reservations - Parsing Sets -- added a Copy Rule function to the Parsing Sets setup dialog.

- Online Reservations - Parsing Sets -- When listing the rules, show a "+" after the field descriptor to

indicate "Append" type rules.

- Added Move Up and Move Down functions to Transaction History (through Reservation or Customer Details). This allows re-ordering transactions if needed, for instance if entering an older transaction you can move it up to a more logical place in their history. This will affect receipts accordingly, and it can also affect the allocation of payments in the Receipts by Category report. (For instance you can move charges up above the corresponding payment so that it allocates the payment more accurately, e.g. if the payment was entered first.)

- Added an option to include a column for the Workstation number in the Transactions tab detail view. (Only useful if networked.)

- Added customer notes to the warning-flag verification prompt.

- Online Reservations -- check for duplicate customers immediately when saving the reservation, and also check for the duplicate having the Warning flag set.

- Added a "Clear all Selected" button to pick-list-selection dialogs (e.g. when choosing Site Types in Edit Rate Definition).

- Include Misc. Income and Expense transactions in the "Receipts by Payment Method" and "Receipts by Category" Quick-Reports.

- Added more descriptive information about the Master's IP address in Network Setup.

- Allow imported or online reservation dates to be in the long format, like "July 5, 2005".

- Allow imported or online reservation dates to use periods as separators, like "5.28.05".

- Online reservations - Parsing Sets -- show the rules in an easier to read grid, and allow multiple selection for move, copy and delete functions. Also added an Insert function.

- Added a warning about possible duplicate charges if credit card processing times out (and a tip to increase the time out setting to avoid duplicate charges).

- **Added Online Reservation support for Friend Communications** (a.k.a. Reservation Friend) online requests via E-mail, with a default template already set up.

- Updated Zip Code and Postal Code data (1071 new U.S. zip codes, 9763 new Canadian postal codes).

- **Added an option to allow Guest reservations to be checked in before their host, and checked out after their host.** This is disabled by default, go to Program Options / Reservations to enable it. Note that the dates of guest reservations must still be within the host's dates -- this option simply allows them to arrive in any order on the first day (or depart in any order on the last day).

- **Allow the Reservation Type to be changed to or from an Owner type, in Reservation Details.** Previously this was not allowed since the status for each type was incompatible, but now it can be done and the proper status is set.

- Added Export to Web link format options for different date formats: <date-dmy>, <date-mdy> and <date-ymd>.

- Importing - Added a GuestTracker status field option, to convert their status to Campground Master status.

- Importing - Added Import ID fields for customers and reservations, so that data from separate customer, reservation, and transaction files can be easily imported as long as they have relational links in them.

- Importing - Allow importing deposits as simple amounts, without requiring any other Transaction data fields to be present. (If only an Amount field is defined, it's assumed to be a deposit balance.)

- When auto-formatting mixed case names, don't capitalize "and" in between names, like "John and Mary".

- Added an option to auto-open the cash drawer when a payment is entered (without printing the receipt), and also show "Change Due" whenever cash drawer is opened.

3   Fixes implemented

Problems that were considered significant functional issues are noted in bold print.

- Don't allow editing a processed credit card payment amount, even by administrators.

- Allow using "Delete" from Customer Details when opened directly from the Rack.

- On the POS Edit Inventory dialog, disable the Add quantity button if the operator's access shouldn't allow it.

- Changed the New Reservation dialog to take the requested Blocked-To date into account when showing available sites.

- Adjusted the 3" receipt formatting so the "Change Due" is always shown on a separate line (in some cases it wasn't, e.g. when a generic text printer driver was used).

- Fixed New Reservation dialog so it doesn't check the Blocked-To box every time a customer ID is selected. (It will also go through all old reservations and make sure blocked-to isn't set inappropriately). This was a new bug in version 3.1.

- Only show the "Site is unavailable for the selected dates" warning if changes to a reservation (through Reservation Details) include date or status changes that might affect this. In other words, avoid the warning if it's not necessary.

- Fixed Email confirmations so the customer's Country is shown instead of showing the City/State/Zip twice

- When adding scheduled (hourly) reservations as sub-members, don't use the beginning period of the start date if you double-click the grid -- instead it starts on the period double-clicked.

- When doing a New Reservation for scheduled (hourly) reservations, if you change the start or end period manually and then double-click to select a site, use the changed values instead of the double-clicked period.

- Made the Site Details display faster by not filling in the site front/back/left/right lists unless those fields are enabled

- POS -- Fixed the Program Options / POS options so that it saves the setting for automatically re-opening the Sales Entry dialog when Campground Master closes.

- POS -- Allow Void and Return functions even if Delete is not allowed for the current operator.

- Fixed Payments Due tab to remember Options settings for Paid Thru and Unpaid Nights fields.

- If a database is opened directly from Explorer, for instance by double-clicking on a database file, don't make it the new default (assume it's just temporary, e.g. opening a backup).

- When entering credit card payments (and processing through Campground Master), charge the correct Amount Tendered if a value is entered there by mistake (instead of in Amount to Pay).

- If the current Windows user doesn't have permission to delete files in the database folder, try the old 'direct' method of saving the database instead of failing with an error message.

- Fixed the Transactions Receipts by Category report distribution for negative payments (e.g. returned checks), so it doesn't double the category amounts of the original payment. Note -- this could affect totals in reports for previous dates, as compared with reports in previous versions!

- Fixed so the negative-charges access level isn't required to enter discounts that are taxed (because it resulted in negative taxes).

- Fix auto-rate recalculations so any memo transactions in the rate isn't added repeatedly.

- Fix Rates Setup so a memo can be made printable (by changing the Category for the memo).

- Added an FTP settings option (for Export to Web uploads) for "passive transfer" mode, and turn off by default, so that it works with FTP servers that don't support passive transfer.

- Fixed networking lock on the Transaction tab's Summary Options and More Filters dialogs (so these functions can be accessed from multiple workstations at once).

- **Made several corrections to the Receipts by Category report.** Now includes a "Deposit" category, where all deposits will go until they're applied to charges. Then the amount will be deducted form the Deposits category and put into the proper charge categories. (So it works the same way as exporting to QuickBooks.) This is separate from the Uncategorized amount, to help clarify the report.

- Don't automatically grab the customer's Discount every time it auto-calculates or transactions are edited. (This was making it impossible to clear the Discount Used field for a reservation.) Now it will retain whatever discount is selected in the Reservation Details. If the Customer discount is changed, it will prompt for whether this should affect current reservations, so you can decide whether to apply it to the reservations or not.

- Don't allow network connections with the same ID as the master workstation.

- If a discount transaction is in an auto-rate even though no discount selection is required, don't require a discount type selection.

- Fixed Select Rates for meter rates to use the current date instead of reservation dates for auto-selecting the rates to show.

- Don't reset the Rack view to "today" when Show Range is unchecked.

4   Online Reservations

Overview

Campground Master supports Online Reservations in a few different ways, depending on your needs. You can use one part of it or any combination of parts:

- Retrieve reservations from made through Friend Communications' online service, *Reservation Friend*.

- Retrieve reservations from the online service *Webervations.com*, and also update the availability data for your park.

- Retrieve and extract reservation data from formatted E-mails (like form submissions from your web site, or E-mail notifications from other online services). Multiple E-mail formats can be handled in case you get requests from more than one source.

- Create "vacancy grid" web pages with availability data and upload them to your own web site.

Refer to the Online Reservations Setup section for the various requirements for each part.

General Guidelines for Taking Online Reservations

While Campground Master is not a real-time online system in itself, it can integrate with 3rd-party reservation services like Reservation Friend or Webervations.com if you want the customer to get instant feedback (e.g. the reservation is accepted and they get a confirmation immediately, without your intervention). You can also achieve near-real-time functionality with your own web site if you constantly update the online availability information (e.g. after any local reservation change) and check for new online requests regularly. Naturally a high-speed Internet connection is recommended for this, especially if you get more than a few reservations per day.

Avoiding Conflicts Between Online and Offline (Local) Reservations

In general, accepting online reservations is only fool-proof if you set aside certain sites to be used *only* for online requests, since the person online can't see your local system at exactly the same time as you. Without this separation of sites, you could potentially be making a reservation on the same site and for the same day as someone online, resulting in a conflict. Campground Master lets you designate which sites are to be shown as available online (assuming you use one of the options to upload availability data, either to your own web site or to Webervations).

If separation of sites isn't practical, you can also minimize potential conflicts by taking requests only for a certain type of site instead of taking requests for a specific site number. The customer would select the type of site, and you would select an appropriate site for them as you process the request locally. You can also combine this with limiting the number of sites available online. For instance if you have 40 cabins and 50 tent sites, you might designate only 20 cabins and 20 tent sites for online availability

You can also specify a number of "online release days" as a buffer -- for instance, you may specify that online reservations can only be made for dates at least 3 days in the future (or any number of days you think is appropriate). This allows you to handle short-term walk-in customers without worrying about conflicting with online reservation requests.

Handling the Online Requests

All online reservation requests must be "processed" and "saved" locally in Campground Master by a human operator -- they aren't automatically added without your knowledge. This requires an operator to view the reservation request and make sure everything is in order before saving it.

While this isn't quite as convenient as a fully-online system, it does help eliminate "junk" requests from the Internet, duplicate customers, missing information and other problems with automatic systems. For instance you can respond to requests with incomplete information before accepting them. You can also reject requests from known trouble-makers, and keep someone from causing problems like reserving entire blocks of sites without intending to show up. If you don't guarantee a specific site as requested, you also have the option of selecting a more appropriate site before confirming the reservation.

While processing online requests, the operator can assign a site if necessary, process a credit card deposit, send a confirmation E-mail to the customer, and save the reservation into Campground Master. Assuming that most of the information is filled out properly by the customer on the web site, this is a fairly quick and easy process and eliminates the need for customer information to be typed in manually.

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 Setup for complete details.

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. Upload Site Availability -- 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 Webervations), 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 request functions available on the main Online Reservation Requests dialog.

Paste & Process Request Text

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 is through America Online, then E-mail requests can't be retrieved automatically. You will need to copy the request from the America Online 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

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

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, or the Webervations pending requests queue). 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 from a service like Webervations, 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.

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 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.

Retrieving Reservation Friend Requests

When "Reservation Friend" is selected as the Source, it will check the POP3 mailbox (as designated in the setup) for any new reservations made through that service. This works exactly the same as described above for E-mail requests, except that separate connection settings are used for Reservation Friend so they may be retrieved from a different POP3 mailbox. Also, the temporary E-mail file is named "email_friend.txt" for messages from this source.

Retrieving Webervations Requests

When "Webervations" is selected as the <u>Source</u>, it will send a download request to the Webervations web server to get any new requests. It will download all new requests and extract the data from them. All requests retrieved are also saved in a temporary file "webervations_xml.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, although it's actually in XML format. You can use the <u>Re-process Downloaded Requests</u> function to read this file and parse all requests again if needed (for instance if you're still testing your parsing rules). Once you're sure that you don't need the saved requests any more, use the <u>Delete all Downloaded Requests</u> function to clear this temporary file.

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.

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

This dialog is invoked through Online Reservation Requests, by selecting the request in the list and clicking the View / Process selected request button at the bottom. 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. Likewise for Webervations requests, only sites matching the request parameters (Room Name and Unit Class) will be shown by default. 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 Save & Continue to Details, and do Quote/Confirmation 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 Save & Continue to Details function (covered below), which will take you to Reservation Details. From there you will go to New/Edit Transactions 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 Save & Continue to Details, enter the deposit if needed, then use the Quote/Confirmation 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.

Uploading Site Availability Data

Once all processing is done, or any time you want to update the sites available on your web site or on Webervations, then access this function through <u>Reservations</u> / <u>Retrieve Online Reservations</u>. It's not necessary to retrieve or process any requests before using the Upload function here -- you can do it any time, for instance after entering reservations locally, if you want to keep the online information current.

The type of "Upload" done will depend on the <u>Source</u> selected, as described below.

E-mail -- Regardless of where the E-mail requests actually come from, the Upload function for the E-mail source is actually the same as the Export to Web Vacancy Grid function through File / Export. However when you use the Upload function here, it will automatically do both the Export step and the Upload step in a single click, without showing the Export to Web setup dialog. This assumes of course that the Export to Web FTP settings have been set up in Online Reservations - Connections & Options. Otherwise it will export the pages and then show an error message indicating that it can't do the upload step.

Reservation Friend -- Uploading site availability is not available for this service.

Webervations -- If you have a Webervations account and have done the setup for this, then clicking the Upload button when Webervations is selected as the source will create and upload the availability to Webervations in their required format. For more information, see the Online Reservation Setup sections. Note that Webervations sends you an E-mail each time you do an upload, and that's where any data errors are reported (other than connection errors) -- Campground Master will not see these error messages, so be sure to check your E-mail soon after uploading.

Online Reservations Setup

Overview

Online reservation functions will be disabled until the required setup is done. The setup for online reservations is fairly advanced and will require some knowledge of internet settings, plus a basic understanding of computer programming logic will be helpful if you need to set up parsing sets for E-mail requests.

All of the Online Reservations setup functions require Administrator access.

The specifics of the setup depend on which types of online requests you want to handle -- retrieving and parsing formatted E-mail requests, uploading vacancy grid pages to your own web site, or integration with the Webervations online reservation service.

Once you've decided which parts of the online reservation support you need to use, there are 4 major steps that need to be performed for setup:

- **Data Fields** -- Enable the appropriate data fields needed for online request processing.

- **Connections & Options** -- Set up the connection parameters required for each type of processing used.

- **Parsing Sets** -- Define the parsing rules for extracting data from the requests.

- **Site Fields** -- Fill in the specifics of how each site will be used and identified for online requests.

Each of these is covered in detail in the following sections. See the "Setting Up" checklists for each type of online reservation handling for a quick guide to what's needed.

Requirements

There are various prerequisites for using the Online Reservations functions in Campground Master, outside the program itself.

Internet Access

It should go without saying that access to the Internet is required for online reservation processing by Campground Master. Of course if you use a 3rd-party service like Reservation Friend or Webervations then you could let them handle the online reservations separate from Campground Master, but if you don't use Campground Master's functionality to retrieve those reservations then you would have to enter them into the system manually.

More specifically, you will need to be able to access the Internet anytime you want to retrieve online requests and/or update the sites available on the Internet. A constant connection is not needed, but a high-speed connection is recommended if you do this often.

You will also need to make sure that any firewall or other security software allows Campground Master the appropriate types of access to the Internet. For instance it will need POP3 access to retrieve requests directly from E-mail or Reservation Friend, secure HTTP (HTTPS) access to retrieve requests from and update the Webervations availability, and FTP access to upload availability to your own web site.

Note that access is only required from one computer running Campground Master. So if you have a networked installation, only one of the Campground Master workstations requires Internet access. The rest can be protected from the Internet if desired.

E-mail Requests

We refer to "E-mail requests" rather loosely throughout this documentation, but be aware that not just any E-mail request can be handled. A request must have a certain structure in order for Campground Master to extract the data from the E-mail text automatically, using Parsing Rules that you define. The request text is assumed to be some type of web form submission or formatted confirmation from a 3rd-party online reservation service. For instance, most web forms send an E-mail to you that have one field on each line, with a field name followed by the data. The parsing rules allow much more flexibility than that, but that's the general idea. See the Parsing Rules section for more details and examples.

In order to retrieve E-mail requests automatically, the requests must be available in a "POP3" mailbox. This is an Internet mail standard. However some E-mail services don't make this available, like America Online, and web-based E-mail services like Hotmail or Yahoo may not allow POP3 access. If you don't have a POP3 mailbox, then you will have to copy the text out of the E-mail and use the "Paste & Process" option to

process the requests.

It's also strongly recommended that you have a POP3 mailbox set up exclusively for online requests. While any non-request E-mails can be ignored automatically, there are other problems with trying to retrieve requests from the same mailbox as you use for your own mail. The main problem is that when you retrieve your E-mail from another program like Outlook, any requests that might already be in your mailbox will be deleted from the POP3 server -- so Campground Master can't retrieve them automatically. You would then have to copy them and use the Paste & Process option to manually process them. This can quickly turn into a nuisance and possibly missed reservations.

Of course if you're taking reservation requests from a form on your own web site, you may also want to show the current site availability and update it as often as possible. For this you can use the Export to Web Vacancy Grid functionality. This is covered in a separate section, but in general this is assumed to be the "upload" half of E-mail request processing.

Reservation Friend

If you use the 3rd-party Reservation Friend service (through Friend Communications), Campground Master can retrieve and extract the reservation data from E-mail confirmations that they can send in a special format. If you don't have a web site or don't want to spend the time to set up reservation forms on your web site, you can use this service to accept online reservations. They can also accept credit card payment directly for full payment of the reservation. As of this writing, they charge a percentage for reservation payments taken through their service, with no annual fee.

To use this service, you will first need to get an account with Friend Communications, and go through their setup process (add your sites, descriptions, rates, etc. as needed). You will also need to decide which sites you want to designate as available for reservations through their service -- since availability can't be updated from Campground Master, it's recommended that you select only a portion of your sites for online reservations through their service, and treat them as being restricted to online reservations.

You can also specify that sites will be "released" from Reservation Friend a certain number of days before the arrival date, so they could be used for walk-in customers if no online reservation was made for them. You can configure Campground Master to know which sites are available and how many days before arrival they should be released, to help avoid double booking.

Since Reservation Friend data is sent to you as E-mail messages, you also need a "POP3" mailbox for these. We recommend using a separate mailbox for these messages to keep them separate from your normal E-mail, and if you're also getting E-mail requests from your own web site or another service then you should keep it separate from those also. Friend Communications can provide a POP3 mailbox for these if necessary, or you can tell them to send the messages to any mailbox you desire. You can also get their normal "human-readable" confirmation E-mails separately from this special form data, and that can go to your everyday E-mail account without affecting the online reservations function..

Refer to the Setting Up for Reservation Friend section for more information.

Webervations

Campground Master supports the download and upload protocols for Webervations.com, a 3rd party online reservation service. If you don't have a web site or don't want to spend the time to set up reservation forms on your web site, you can use this service to accept online reservations. As of this writing, Webervations charges a flat $80 per year for their service. They will show availability for a site (or a class of sites as a whole), which Campground Master uploads to their server, and makes requests available for downloading directly into Campground Master.

To use this service, you will first need to get an account with Webervations, and go through their setup

process (add your sites, descriptions, rates, etc. as needed). You will also need to decide whether you want requests to be made for a specific site or only for a "class" or "type" of site (so you can select the site for the customer). This will determine how you set up Webervations, and also how you set up the fields in Campground Master to select sites appropriately.

Refer to the Setting Up for Webervations section for more information.

Setting Up for Export to Web

If you're interested in setting up Campground Master to export the web vacancy grid and upload it to your web site, the following areas need to be addressed. (See the related sections for details.) If you're not familiar with web site programming, we recommend that you get the assistance of your web site designer.

- Make sure you have FTP access to your web site, to upload the web pages once they're generated.

- Set up the FTP connection settings for uploading.

- Create one or more web page template files to be used when generating the pages.

- Set up the other configuration options through File / Export / Export to Web Vacancy Grid.

- Enable the Site data fields "Site_Online_ExWeb_Ex" and/or "Site_Online_ExWeb_Release_Days" if you want to limit online or offline availability of sites.

- Fill in the Site data fields above with the appropriate values.

Note that this functionality is often used in conjunction with the E-mail Requests functionality, so a request form on your web site would feed requests to Campground Master through E-mail.

Setting Up for E-mail Requests

If you're interested in setting up Campground Master to retrieve online reservation requests from E-mail messages (e.g. web site form submissions or online service confirmations), the following areas need to be addressed. (See the related sections for details.)

- Make sure the Reservations data field "Resv_Online_Request_ID" is enabled.

- Make sure you have a POP3 E-mail mailbox available that will receive the E-mail requests.

- Set up the POP3 connection settings for downloading E-mail (must at least be "Enabled" for some other setup functions to be available).

- Set up one or more Parsing Sets to extract the data from the E-mail. You'll need to know the format of the requests -- if using your own web site form, you might want to tweak it to make parsing easier and get as much information as possible in the format Campground Master uses.

- Enable the Site data fields "Site_Online_Email_ID" and/or "Site_Online_Email_Type" if the site name or type in the requests will not be exactly the same as the site name and type used in Campground Master. You also need to decide how you want to handle requests -- e.g. assign a site yourself, or use the customer's requested site if possible, etc.

- Fill in the Site data fields above with the appropriate values.

Setting Up for Reservation Friend

If you're interested in setting up Campground Master to retrieve online reservation data from Reservation Friend, the following areas need to be addressed. (See the related sections for details.) For the most part, this works exactly the same as for retrieving other E-mail requests.

- Make sure the Reservations data field "Resv_Online_Request_ID" is enabled.

- Make sure you have a POP3 E-mail mailbox available that will receive the reservation data from Reservation Friend.

- Set up the POP3 connection settings for downloading the E-mail messages (must at least be "Enabled" for some other setup functions to be available).

- Enable the Site data fields "Site_Online_Friend_ID" and "Site_Online_Friend_Release_Days".

- Fill in the Site data fields above with the appropriate values -- in particular, the ID for each site must be set to the text value that Reservation Friend calls the site.

- Set up one or more Parsing Sets to extract the data from the E-mail messages. There is a default parsing set for Reservation Friend built in, but some of the rules may need to be adjusted to match your particular setup (see below).

Transactions Notes

Since Campground Master has to use its own charges, discounts, and taxes (presumably from your Rates definitions), the only real transaction imported from the online reservation is the Deposit, if they paid one. The total amount due, plus any discounts, taxes, and add-ons selected on Reservation Friend will be imported as "Memo" transactions for your reference, but they will not affect the customer's balance.

Parsing Rule Adjustments

The default parsing rules for Reservation Friend are set up to handle the basic implementation as known at the time of the program's release. There may be some adjustments required to the rules depending on your particular setup on Reservation Friend and/or additions they make to the fields available.

Adders (reservation add-on items) -- There is a long list of "adders" available on Friend, and you may have added your own. The rules are set up to look at the adder ID numbers and insert a memo transaction with appropriate text. If an adder ID is not recognized, the memo will indicate this but you should review all adders you use on Friend and make sure the 5 sets of Trans parsing rules (for Trans[1] through Trans[5]) each contain a rule for every adder ID you use. Of course you can also change the text used for the memo if you like.

Unit Types -- There is a "unit type" field which will contain the rig types according to the list you set up on Friend. Since this is extracted to the Rig Type field, we recommend that you set up Friend with the exact names from the Rig Type Pick List in Campground Master (the "Normal Text" field of the pick list). Otherwise you'll need to modify the rules to convert the unit types returned from Friend into the appropriate Rig Type in your pick list -- which would require a series of "Set value if Compare-to matches" rules. If you don't use this field at all, you may delete this rule.

Amp Service -- There is an "amp service" field which will contain a value according to the selections you set up on Friend. The default rules only check for this being "50", in which case the reservation preference field "50A" is set to "Must Have". If you set up other values for this, or need to check for values other than 50,

then the rules will need to be modified accordingly. If you don't use this field at all, you may delete this rule.

Setting Up for Webervations

If you're interested in setting up Campground Master to retrieve online reservation requests from the online service Webervations.com, the following areas need to be addressed. (See the related sections for details.)

- Create an account on Webervations.com

- Set up the Webervations connection settings, using your Webervations account information (must at least be "Enabled" for some other setup functions to be available).

- Decide how you want sites to be represented in Webervations (see below) .

- Make sure the Reservations data field "Resv_Online_Request_ID" is enabled.

- Enable the Site data fields "Site_Online_Weberv_ID", "Site_Online_Weberv_Name", and "Site_Online_Weberv_Class".

- Enable the Site data fields "Site_Online_Weberv_Ex" and/or "Site_Online_Weberv_Release_Days" if desired.

- Fill in the Site data fields above with the appropriate values.

- Set up one or more Parsing Sets to extract the data from Webervations. There is a default parsing set for Webervations that should work in most cases, though you might need to make some small changes or additions depending on your Webervations account setup.

Webervations Site Configuration

When you set up your Webervations account, you need to create a number of "Rooms", and optionally "Unit Classes". You can also specify how many "Units" are available for each "Room". So instead of actually creating a separate room for each of your sites, you can treat the "Rooms" in Webervations more like the Site Types in Campground Master. So for instance you can have a "Normal RV" room, "Deluxe RV" room, "Tent" room, etc. Then for the number of units in each room, enter the number of sites you have of that type.

On the other hand, there's no need to match up with your site types exactly. If you want to create more specific rooms, you can do so. For instance you might want to divide them by 30A/50A service, lakefront vs. street-front, or however you would like to allow the customer to choose a site or location. Campground Master allows you to specify the "Room Name" used in Webervations for each site, so you can assign them as needed.

Now assuming that you treat the rooms similar to site types as described above, a reservation request will indicate the "Room Name", which is really the type of site. If there happens to be only one site of that type configured, then it will automatically assign that site to the reservation. Otherwise, you will need to select the site yourself when processing the reservation.

Alternatively you can set up a room for each site you have. This would be appropriate if you have a small number of condos or cabins, for instance.

Whether you set it up as groups or just individual sites, be sure to set the "Site_Online_Weberv_Name" data field for each site appropriately so it matches the room name you used in Webervations. This is case-sensitive. If a value is entered for a site that doesn't match a room name exactly, Webervations will report an error when you upload availability data (and of course a request for that room might not work since it

doesn't match the site). Note that Webervations sends you an E-mail each time you do an upload, and that's where errors are reported -- Campground Master will not see the error messages, so be sure to check your E-mail soon after uploading.

The Unit Class, which equates to the "Site_Online_Weberv_Class" field, is usually set to "Default" unless you specify a different class in Webervations. You could use this to divide up classes similar to the Site Class in Campground Master, but it's not required unless you need more than 50 "Rooms" defined in Webervations. Remember that one "Room" in Webervations can actually be as many Sites as needed, so 50 Rooms is usually sufficient unless you want every site listed individually.

The "Site_Online_Weberv_ID" field is not currently used other than when uploading availability to Webervations. You should set this field to be the same as the room name ("Site_Online_Weberv_Name") to make it work properly. Otherwise it may upload more "rooms" than you intend (see below).

Of course you don't have to expose all of your sites to Webervations. You decide which ones you want to be available for online reservations, and set those up in your Webervations account.. Use the field "Site_Online_Weberv_Ex" to exclude sites from Webervations availability so they're not uploaded.

You can also use the "Site_Online_Weberv_Release_Days" field to remove sites from online availability a specified number of days ahead of time -- but this assumes you're uploading availability at least once per day. Campground Master actually uses this to create the availability data accordingly -- Webervations doesn't know about this value, so if you don't update your availability often enough then it's irrelevant.

Note that when you upload the availability data, an entry will be created for each unique combination of "Room", "ID", and "Class", indicating the number of units for each room are available for that combination. This must match what Webervations expects. This is why we recommend that the Room and ID always be identical, and that you just use "Default" for the Class (unless you create multiple classes in Webervations of course). This is the way Webervations expects it.

Data Fields Used

There are several data fields associated with retrieving and processing online reservations. These are all disabled by default to minimize database size for those not requiring this function, but they must be enabled before the online reservations processing can be used. See Maintenance / Data Field Definitions to enable data fields as detailed below:

For any online reservation processing:

The Reservations data field "Resv_Online_Request_ID" **must** be enabled for any online processing (except Exporting to a web vacancy grid). This is used to store a unique identifier for each online request, so duplicate requests can be ignored.

The Reservations data field "Resv_Online_Request_Raw_Text" can be enabled if you want the raw text of the online request (e.g. the actual E-mail or Webervations data) to be saved with the reservation for future reference. It's not needed by the program at all, but might be useful if there's any question about what was actually in the request. You can view the request text through Reservation Details. **Warning** -- this will use a lot of space in the database, so if you expect to receive hundreds of online requests per year then this might not be worth the memory used. Instead, you could keep copies of the temporary download files before deleting them (but this requires manually copying the files in Windows).

For E-mail request processing:

The Site data field "Site_Online_Email_ID" is optional -- it can be enabled if the site name or number you expect in E-mail requests is different than the Full Name for the sites.

The Site data field "Site_Online_Email_Type" is optional -- it can be enabled if requests will be made by the type of site rather than specific site numbers.

For Exporting to a web vacancy grid (on your own web site):

The Site data field "Site_Online_ExWeb_Ex" is optional -- it can be enabled if you want to exclude some sites from the availability information on your web site.

The Site data field "Site_Online_ExWeb_Release_Days" is optional -- it can be enabled if you want to specify that sites are removed from online availability a certain number of days ahead of time. See the section Online Connections -- General for more information on release days.

For Reservation Friend processing:

The Site data field "Site_Online_Friend_ID" **must** be enabled for Reservation Friend functionality. This will contain the site name as they report it in the reservation data.

The Site data field "Site_Online_Friend_Release_Days" is optional, but should be set up if Reservation Friend releases the site for walk-in reservations 1 or more days prior to the arrival date. See the section Online Connections -- General for more information on release days.

For Webervations requests and availability upload:

The Site data fields "Site_Online_Weberv_ID", "Site_Online_Weberv_Name", and "Site_Online_Weberv_Class" **must** be enabled for Webervations functionality.

The Site data field "Site_Online_Weberv_Ex" is optional -- it can be enabled if you want to exclude some sites from Webervations availability.

The Site data field "Site_Online_Weberv_Release_Days" is optional -- can be enabled if you want to specify that sites are removed from Webervations availability a certain number of days ahead of time. See the section Online Connections -- General for more information on release days.

Online Connections - General

Currently there is only one option under the General section, but it takes some explanation.

Consider any dates past the "Release Days" as only available for Online Reservations -- Set this option if you want to consider sites as unavailable for local reservations if it's available for online reservations, according to the Release Days field(s) for each site.

As mentioned in Data Fields Used, there is a "Release Days" field for each of the types of online reservation services that can be uploaded to (Webervations and the Export to Web for your own web site), and also for the Reservation Friend service since they support this functionality. If one or more of these fields is enabled, and also assuming that the site is not excluded from that type of online reservations, then the site will be

marked as unavailable for local reservations after the # of release days specified.

As an example: If you have the Release Days for Export to Web set to 3, then that means the site is released from online availability 3 days ahead of time (3 days from today). That also means that it's available for online requests starting 3 days from now (e.g. someone could be reserving the site online for any dates 3 days from now or later). Therefore, you should avoid making local reservations for it that might conflict with the online reservations. Setting this option will make the site show as unavailable on the Rack starting 3 days from now (e.g. the first 3 days will be available, but after that it will be considered unavailable for locally made reservations).

Sites that are considered available for online reservations in this manner are shown in a different color on the Rack (a medium blue by default, different than the normal grey for unavailable). They will also be excluded from the list of available sites any time "Show Available" or "Available Only" is selected.

Note that if an attempt is made to create a reservation covering an online-only date, either a warning or error will be shown depending on the Access Levels setting and the current operator's level. If the operator doesn't have access to make local reservations for online-only dates, an error will be shown and the reservation cannot be saved. The access level required is Manager by default, but it can be modified through Maintenance / Park Setup / Access Levels.

Online Connections - Export to Web

Campground Master has built-in FTP (File Transfer Protocol) functionality for uploading web pages to your web site after using the Export to Web Vacancy Grid function. Some familiarity with your web host provider's uploading requirements is needed to configure this functionality. Obviously the first requirement is that you have your own web site, and that the web server that it's on supports uploading the web pages with FTP. It should also go without saying that the computer must have a connection to the internet.

The basic settings are the same as for any FTP program. Contact your web host provider for the actual settings to be used (just ask for your "FTP configuration settings for uploading web files"), but example entries are shown below:

Host Name/Address: **mywebname.myhost.com**
Port Number: **21**
Username: **myusername**
Password: **mypassword**
Remote directory: **public_html/vacancyfolder**

Passive Transfer -- This option can be selected for most web hosts, but some will not allow it. If you're having trouble with the upload, try changing this option.

Online Connections - E-mail Requests

In order to retrieve online requests from E-mail, the appropriate settings need to be configured in Maintenance / Online Setup / Online Reservations - Connections & Options. This allows Campground Master to retrieve E-mail messages from a POP3 mailbox. (POP3 stands for "Post Office Protocol 3", which is a standard E-mail system used on the Internet.) These settings are similar to configuring most E-mail applications in Windows, like Microsoft Outlook.

To use the E-mail retrieval functions, Campground Master must be able to access a POP3 mail server via the Internet. For more details, see the Online Reservations Setup / Requirements section.

Enable retrieval of online reservation requests from E-mail

This box must be checked to enable the E-mail portion of Online Reservations support. If this is not checked, the "E-mail" option will not be available in other Online Reservations functions.

Automatically connect to the Internet each time

If you use a dial-up internet service, you can select this option to connect automatically when it needs to retrieve E-mail (and it will also disconnect automatically when done).

POP3 Server Settings

You will need to enter the appropriate settings for accessing the POP3 mailbox. The host name/address is usually "mail" or "pop" followed by your ISP or web host domain name. An example is below:

Host Name/Address: **pop.myisp.com**
Port Number: **110**
Username :   **myusername**
Password :   **mypassword**

If you have any questions about the proper settings to use in POP3 Setup, please contact your Internet provider.

Delete messages from server immediately after retrieving them

Use caution when choosing this option. Once you have things running smoothly, this can be selected if (and **only** if) the POP3 mailbox you're using is dedicated to online requests -- otherwise it would delete all of your other messages also, before you can download them with your normal E-mail program. If this option is not checked, messages will continue to accumulate in the mailbox (and take time to download each time), until you manually delete them. You could still delete messages by logging into the mailbox from another E-mail program, but you would have to be careful about deleting requests not yet processed.

Remember that all retrieved messages are also stored in a local file when they're retrieved, so even if you delete the requests from the mailbox but don't get a chance to process them, you can use the Reprocess Downloaded Requests function to get them from the downloaded file later (until you use Delete the Downloaded Requests of course).

Local Working Directory

This is where the downloaded requests will be saved locally, in a file named "email.txt". This defaults to a blank entry, 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.

Defaults for Online Deposit Transactions

If you're using a 3rd-party reservation service and they take a deposit for you, then you probably want to use a special Payment Method and Description for these deposits (since they're not coming directly into your normal account). If the payment description field is left blank, it will default to the payment method name.

You can also designate a special Operator name so you can identify them on reports. If this is left blank, the transaction and reservation will be recorded with the operator logged in at the time the request is processed.

Note that even if you won't be receiving deposits online, you can set the operator name to be used in "Created by" for the reservations.

Note that if you enter a deposit locally after saving the reservation request, then these values aren't used for that deposit transaction (the current operator is used).

Online Connections - Reservation Friend

In order to retrieve online requests from Reservation Friend, the appropriate settings need to be configured in Maintenance / Online Setup / Online Reservations - Connections & Options. This allows Campground Master to retrieve the reservation data E-mail messages from a POP3 mailbox.

These settings are exactly the same as for setting up for E-mail Requests, so refer to that section for details.

The connection settings are separate so that you can use a different POP3 mailbox for Reservation Friend requests than you do for other E-mail requests -- this is recommended so that you can handle them separately. You can also specify different defaults for online payment transactions, so for instance you can indicate that the deposit (or payment) was made directly to Friend Communications.

Online Connections - Webervations

In order to retrieve online requests from Webervations (and upload new availability data to them), the appropriate settings need to be configured in Maintenance / Online Setup / Online Reservations - Connections & Options. This allows Campground Master to retrieve reservation requests directly from your account on the Webervations web site, using their special protocol. For more information on what's required for using Webervations, see the Online Reservations Setup / Requirements section.

Enable retrieval of online reservation requests from Webervations.com

This box must be checked to enable the Webervations portion of Online Reservations support. If this is not checked, the "Webervations" option will not be available in other Online Reservations functions.

Automatically connect to the Internet each time

If you use a dial-up internet service, you can select this option to connect automatically when it needs to retrieve requests (and it will also disconnect automatically when done).

Clear pending requests from server after they're retrieved

Once you have things running smoothly, this option can be selected to delete processed requests from the server. If this option is not checked, requests will continue to accumulate on the server (and take time to download each time). There is no other way to delete the requests -- even if you don't leave this option checked all the time, check it once in awhile to clear the accumulated requests.

Remember that all retrieved messages are also stored in a local file when they're retrieved, so even if you delete the requests from the server but don't get a chance to process them, you can use the Reprocess Downloaded Requests function to get them from the downloaded file later (until you use Delete the Downloaded Requests to clear them out, of course).

Other Settings for data retrieval

You will need to enter the appropriate settings for accessing your account on Webervations. Note that only the Username and Password for your account should be modified unless otherwise instructed. The rest of 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 Webervations changes its format):

Download host: **https://secure.webervations.com**   Port: **443**
Download file: **/magic-scripts/down/download_bookings.asp**
Upload host: **http://uploads.webervations.com**   Port: **80**
Upload file: **/magic-scripts/down/get_cgmaster_xml.asp**

Local Working Directory

This is where it will save the downloaded requests locally, in a file named "webervations_xml.txt". Other temporary files may also be placed there, for instance the availability data to be uploaded. The path defaults to a blank entry, 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.

Confirmation # Format

Webervations doesn't assign confirmation numbers to requests, so Campground Master will assign one according to the format you specify. This is exactly like the main confirmation format specification, except that there's a special "<O>" tag (the letter O, not the number 0). This will insert the unique Online ID from Webervations into the confirmation number if you like. The default format is "RWEB<O>", which will be the online ID prefixed with "RWEB". Thus you will be able to easily see that it came from Webervations. For complete formatting options, see the Maintenance / Program Options / Formats section of the documentation.

Defaults for Online Deposit Transactions

If you're using a 3rd-party reservation service and they take a deposit for you, then you probably want to use a special Payment Method and description for these deposits (since they're not coming directly into your normal account). If the payment description field is left blank, it will default to the payment method name.

You can also designate a special Operator name so you can identify them on reports. If this is left blank, the transaction and reservation will be recorded with the operator logged in at the time the request is processed. Note that even if you won't be receiving deposits online, you can set the operator name to be used in "Created by" for the reservations.

Note that if you enter a deposit locally after saving the reservation request, then these values aren't used for that deposit transaction (the current operator is used).

Online Setup - Parsing Sets

Overview

The parsing engine in Campground Master is the "brain" behind automatically processing online reservations for E-mail requests and Webervations. The parsing engine is used to examine and extract the reservation data whenever you use the functions in <u>Online Reservation Requests</u> to retrieve online requests, re-process downloaded requests, or paste & process requests.

Setting up the parsing rules for the engine is almost like writing a little computer program. The rules are use by the engine to look through the text of the request and figure out how to extract the customer's name and address, the dates they want to stay, what kind of site they want, and all of the other vital information for the reservation. Obviously some experience with programming or database manipulation is helpful, but if you're patient and follow the examples then you should be able to set it up. See the Parsing Rules Technical Details section later for more information.

"Parsing" Defined

"Parsing" is a computer term that generally means manipulating or extracting useful information out of some data. In this particular context, it means extracting the various bits of reservation data out of the E-mail text or other downloaded data.

Parsing Sets and Parsing Rules

A parsing "set" is a group of parsing "rules". Each parsing rule is like one command in a computer program, defining where to find a single data field like the customer's name. A set of these rules, along with a few other parameters, is a parsing set that defines how to extract a complete reservation from one bunch of data, for instance one E-mail message.

The parsing sets are divided into sections depending on the source of the request -- one section for E-mail requests and one section for Webervations. This helps avoid confusion for both you and the parsing engine. However each section can have any number of parsing sets. For instance if you receive E-mail requests from several different online reservation services, you would create a separate parsing set for each service (since the requests would most likely be in different formats for each service).

In some cases you might even have separate sets for different types of requests from the same source. For instance if you have two forms on your web site that ask different questions, like one form for camping sites and one for cabins, you can set up a separate parsing set for each form. You just need to have some unique text in each type of request so that Campground Master can tell them apart and use the right parsing set for it.

Webervations Default Parsing Set

Since Webervations requests are known to have a certain format, the complete definition of this parsing set is already in Campground Master. When you first select Webervations for the parsing set type, this default will be loaded automatically. In fact you don't even need to go into the parsing set setup -- the default set will be added if necessary when you first retrieve Webervations requests.

As of this writing, you should not need to make any changes to the parsing set in order for it to work. However if a change to the parsing set is needed, you can edit it just like any other set. If for some reason you make a mistake and need to start over with the default, you can delete the entire default parsing set, close the parsing set dialog, and it will be replaced when you open the dialog again.

Reservation Friend Default Parsing Set

The general format of the reservation data E-mails from Reservation Friend is already known, so a default parsing set has been set up in Campground Master. When you first select Reservation Friend for the parsing set type, this default will be loaded automatically.

However, you may need to make some changes to the parsing set in order for it to work completely. In particular, you may need to configure it to work with your specific reservation options (50A, extra adults and other "adders"), and for your Rig Type selections. Since the same parsing engine is used for Reservation Friend as for E-mail requests, refer to those sections for details.

E-mail Parsing Sets

Since there is no standard format for E-mail requests, you will have to set this up on your own. However there are some examples later to help you get started. If you're using a 3rd-party reservation service, we may have a parsing set already configured for that service which you can import into the program. (If we don't already have one, we may be able to create it from some examples of their E-mail confirmations.)

Parsing Rule Details and Examples

The basic functionality of the setup dialogs will be covered first, followed by detailed information about parsing rules and some practical examples.

Setup Parsing Sets Dialog

To add or edit parsing sets, go to Maintenance / Online Setup / Online Reservations - Parsing Sets.

Parsing Set Type

This is basically equivalent to the "Source" selection for retrieving online reservations. Select the appropriate type of request you want to set up parsing sets for, e.g. E-mail requests or Webervations requests.

Parsing Set List

This works the same way as the Rates setup dialog, in that it shows a list of defined sets (of the selected online parsing set type), and has functions for Edit, New, Insert, Delete, Copy, Move Up and Move Down, plus the standard Print and Export functions.

To edit a parsing set, for instance, just click the one to be edited and click the **Edit parsing set definition** button. Or you can just double-click on it to edit it. This will open the Edit Parsing Set dialog.

To add a new parsing set, click the **New parsing set definition** button. The same dialog that's used for editing is used to add a new set.

The order of parsing sets can make a difference if you're checking for multiple request formats and use different Identifying Text for each set. They will be processed in the same order that they appear in this list. The one with the most specific identifying text should be at the top. (It would actually be pretty unusual if the identifying text was ambiguous enough that the order would matter anyway, since it's a good idea to make it as specific as possible.)

If you have a parsing set that works great but you need to set up another one that's almost the same, you can use the Copy function. This will also duplicate all of the parsing rules for the copied set(s). This can be handy if you get different requests in the same format except for a small difference. Of course the Identifying Text needs to be able to distinguish the two sets also (more on this in later sections).

Warning -- if you Delete a parsing set, all parsing rules associated with it are immediately deleted too. While this should be obvious, we mention it as a warning because one accidental "Delete" could wipe out a whole lot of work on parsing rules.

Edit Parsing Set Dialog

When you Edit, add New or Insert a parsing set from the Setup Parsing Sets dialog, the Edit Parsing Set dialog is used.

This dialog defines one parsing set, which consists of 4 items:

Set name

This is for your use to identify the set when listed in the Setup Parsing Sets dialog, so just make sure it's different for each set you define.

Identifying Text

This field is important for the parsing to be successful. This is particularly important for E-mail requests, since other types of E-mail need to be filtered out from processing.

Each parsing set should have a different identifying text value so that the parsing engine can determine which parsing set to use for any given E-mail. Furthermore, it should be something unique that not only identifies an E-mail as being a request (as opposed to some other junk E-mail), but also distinguishes requests that need to use this parsing set from requests that need to use a different parsing set. Remember that it will look at the E-mail header in addition to the text of the E-mail, so it's common to use the "from" E-mail address or the subject of the message to identify it. Some simple examples are below:

- "**request@reservationservice.com**" -- This parsing set would only be used for an E-mail with that address in it, which presumably would only be E-mail requests from that online service.

- "**Form: Cabin Rental Request**" -- This parsing set would only be used for and E-mail with that text in it, which would presumably be the subject of messages sent from the cabin rental form on your web site.

- "**RIG_LENGTH_REQUIRED**" -- This parsing set would only be used for and E-mail with that text in it, which is one of the field headers in messages sent from the RV space rental form on your web site (and presumably not present in the cabin rental form, for instance).

- *(empty)* -- If you're using an E-mail mailbox that's dedicated to requests (so the mailbox doesn't get any other junk E-mail), and you only expect one type of request, then you can leave the identifying text blank (don't actually put the word "empty" in it). You could also have a default set with blank identifying text, but make sure it's the last one in the list so any others are checked first.

Try to use something as unique as possible, but don't worry if some other E-mail happens to come in with that text in it by accident. The program will try to parse it, but will simply show an error if the E-mail message doesn't have all of the other fields defined by the parsing rules.

Note that the identifying text is **case sensitive!** Make sure you have any capital letters exactly as they will appear in the E-mail.

Parsing Rules

This is a list of all parsing rules defined for the set. As with the Setup Parsing Sets dialog, the standard Edit/Add/Insert/Copy/Delete/Move functions are available.

The list of rules is a little different than other lists. The "Rule Details" listed will be shown in a format determined by the type of rule and the basic settings for it. This can take some time to get used to, but basically it just shows the type of rule, and the main parameters of the rule (begin/end text, etc.). For instance, rules that have a before and after text and presumably extract some data between them will be shown like "Before___After", where the underline is assumed to be where the extracted text will be. Rules that have the "Append" flag set will have a "+" at the beginning of the rule details. Rules that use the "After previous field" location will have a "..." in them to indicate this.

Notes

You can add notes to the set if you like, which will just be shown in the list of sets in the Setup Parsing Sets dialog.

Importing Rules

If we have a pre-defined set of parsing rules for a particular type of online service, you can import them from a file that we send you instead of adding them all yourself. The format of this import must be precisely as expected, so this should only be used with files provided by us.

Save and Test Parsing Set

As you're setting up your parsing rules, it's helpful to test them frequently to see how they're working. You'll probably want to do this after each new rule is added at first, but don't get lazy about it -- you should test it with various combinations of data before trying it for real requests.

Entering Test Data

When you click "Save & Test Parsing Set" on the Edit Parsing Set dialog, a large window will open where you can enter sample data, for instance a sample E-mail that would need to be parsed. You can type in the data manually, or copy and paste it from another program.

If you already have an E-mail request that you've received, then naturally you would want to use that to test with. Just copy/paste the E-mail text into this window. However it gets even easier the next time -- the last test data used with each parsing set is saved in the database, so you don't have to paste it in each time. Of course you will eventually want to test with various requests with different data, etc. to make sure it works for any possible combination.

E-mail Message Text

When testing the parsing rules for E-mail requests that you expect to eventually have Campground Master retrieve directly from your E-mail box, you should include the full header and raw text as it comes from the POP3 server. Depending on your E-mail program, this means selecting a "Full header" option, or perhaps a "View Source" option to see the raw E-mail text. If you can't find a way to do this, then you may need to get the E-mail request connection portion functioning so you can actually retrieve an E-mail from the server through Retrieve Online Reservations, then copy that E-mail text from the "email.txt" file (where Campground Master puts retrieved messages).

Testing the Rules

Once you have the test data entered, click "Test". It will parse the data using the current parsing rules for this set, and also check to make sure the Identifying Text for the set is present. If there's an error in the rules definition or other serious error, it will show an error message. If there is no error that aborts the parsing, then the Online Reservation Request Details dialog will be shown, just as if you're processing a request received the normal way. Any fields parsed successfully from the data will be shown in the list, so you can check the accuracy of the parsing rules. Of course the "Save" functions are disabled since this is just a test.

Edit Parsing Rule Dialog

When you Edit or add a New parsing rule from the Edit Parsing Set dialog, the Edit Parsing Rule dialog is shown.

The basic method of entering a rule is to set each of the fields in this dialog, in top to bottom order (some fields will be disabled based on the Parsing action choice, so not all fields need to be entered in all cases).

The details of all the different types of rules and how they're used is covered in the section Parsing Rule Technical Details.

Where to look for field -- This has two choices, "Anywhere in the text" or "After previous field".

Parsing action -- There are several choices for what to do if this rule is satisfied. Just select from the list.

Text before field, Text after field, Compare to, and **Set value to** -- enter the text for any of these that are needed, according to the selected parsing action.

Number of Characters -- enter the maximum number of characters to extract (from between the Before and After text), or the exact number of characters to extract if the After text is blank.

Field descriptor -- This is the Campground Master data field (e.g. reservation, customer, or transaction field) that will be set to the value resulting for the parsing rule. It will show the descriptor in text here and you can edit it, but the easiest way to set the field descriptor is to use the **Browse** button, which opens the Select a Data Field dialog.

Append to any previous text for the same field -- Select this box if you want the parsed text to be added to the field instead of replacing it. For instance there may be several bits of information in the request that you want to put in the Reservation Notes.

Convert to Mixed-case, Convert to UPPER-case -- select one of these if you want the parsed text to be converted automatically. This is commonly used for names and addresses, in case the customer didn't use the proper capitalization.

Trim any extra leading and trailing spaces from the value -- Actually all data fields are ultimately trimmed before being saved into a reservation, so this option is checked by default. However this option can be disabled for intermediate parsing, for instance when appending several bits of text to one field. This allows you to insert spaces where needed or keep any spaces in the extracted data.

Notes -- You can add any notes you want, which could be handy for an unusual parsing setup that you may need to figure out at a later date. This dialog is the only place these notes will be shown.

Select a Data Field Dialog

This dialog is used to select a Campground Master data field (e.g. a reservation, customer, or transaction field) to be used in a parsing rule. It will open when using **Browse** from the Edit Parsing Rule dialog.

The Data Field list on the left-hand side will show fields that can be used for the selected Data Table (record type). It may also have "pseudo-fields", which aren't real fields in the database but can be chosen just like a real field to handle the parsed text a certain way. For instance if you choose "Number of Nights", it will actually use the given value to calculate the real Last Night field value when parsing the text.

The Linked/Relational Data Field list on the right-hand side will only have fields in it if the field you choose on the left is a relational (linked) field. For instance if you're looking at Reservation fields and select the "Customer" field on the left (which is a relational link to the customer data table), then all Customer fields will be shown on the right. When there is a list on the right, you must choose one of those fields for the selection to be valid. So for instance you could choose "Last Name" from the list of customer fields. Note that in this case it would have been the same thing as selecting "Customers" directly in the Data Table list and then selecting "Last Name" in the left-hand list -- it's just two ways of getting the same result.

Once you have selected the desired field, click OK and it will convert it into the proper Field Descriptor for the parsing rule. As a shortcut, you can just double-click on the desired field.

Parsing Rules Technical Details

Parsing rules are pretty simple at the basic level of "if you find this then put the text here". This section covers the technical stuff -- for some actual examples that are easy to understand, see the next section with the Parsing Set Example.

Types of Rules (Actions)

If you're getting data from a web form that you design or have designed for you, then it should be easy to set up the rules because you would naturally design the form to ask for all of the information in a format that's very similar to the Campground Master data. In that case, most or all of your rules will be the basic "Extract Field Value" type and will be very simple to implement.

Other types of rules are available to handle special situations that would mostly be an issue if you're trying to parse a request from some other service that uses different types of data. For instance, they might have a field that has the dollar charge for extra adults but does not give the actual number of adults, like Campground Master needs it. You could use the rules to convert various charge amounts into the appropriate number of adults.

Each action type, or rule type, is detailed below. Each type of rule accepts different parameters (before, after, compare-to or set-value text), depending on its function. All of them also need a field descriptor and allow other options like append and convert options, except the Ignore Field rule. Note that the number of characters can be specified also, but to keep it simple this option is covered separately below.

Extract Field value

This is the basic rule used to extract text from the data and set a field value to that text. All you need to do is enter the text that will appear before the value (before-text) and the text that will appear after the value (after-text). For instance, if the request has the customer's last name after the label "LASTNAME:", then enter that label for the before-text. You also need to tell it where to stop extracting the value, so for instance if you know there won't be anything else on that line, enter "**\r**" (carriage return) for the after-text.

You can leave the before-text blank if you want to start extracting immediately from where the position pointer is in the data -- this assumes that the Where to Look is set to "After Previous Field".

Extract Field value if not equal to 'Compare to'

This rule is similar to the previous one in that it looks for the field between the before and after text, but it also lets you specify an exception to extracting the data. In addition to the before and after text, fill in the Compare-to text. The data found will be extracted only if it does not match that text. For instance, the request might specify a site number, or "N/A" if they don't select a site. Use this rule to extract the site number specified as long as it's not "N/A".

You might wonder why there's not a rule to extract a field value if it *is* equal to the compare-to text. That's because the "Set Field value if Compare to matches" rule below can do the same thing.

This rule can also be used to extract a field value only if the text is non-blank, by leaving the Compare-to text blank. In other words, rather than just extracting a blank field, it would skip the extraction and not set the field at all.

Set Field to a fixed value (always)

This rule doesn't actually extract anything from the text. It simply sets a field value no matter what (assuming this parsing set is used). You just enter the set-value-to text for the field.

This rule is generally used to set a default value, for instance to set the How-found field to a specific value for all online requests, or perhaps to set a default for the number of adults in case they didn't specify it in the request. Remember that a rule could follow later in the set that extracts the field if it does find the value in the request, which would replace the default value.

Set Field value if 'Text before field' is found

This rule is similar to the previous one, except it looks for some before-text and only sets the value you specify if that text is found (ignoring anything else actually in the request). This would be used for things like special options that appear as unique words in the request. For instance if the request would have something like "2 ADULTS" in it for the number of adults, it's hard to extract a value appearing before the text. So you can add a number of rules, one for each reasonable number, such that each rule would set the # Adults field to the specific value it finds (e.g. if it finds "3 ADULTS", set the # Adults field to "3").

Set Field value if non-blank data is found

This rule looks for before and after text like the normal Extract rule -- but instead of setting the field value to the extracted text, it will set the field to a specified value as long as the text between the before and after text is not blank. (Remember that whitespace characters like space, tab, carriage return and line feed are considered blank.

Set Field value if 'Compare to' matches

This rule looks for before and after text like the normal Extract rule -- but instead of setting the field value to the extracted text, it will set the field to a specified value as long as the text between the before and after text matches the compare-to text. As an example, lets say the request is expected to have either "Electric: 50A" or "Electric: 30A". If you have a preference field for 50A (which must be set to "Must Have" to show that they want 50A), then you could use this rule. Set the before-text to "Electric:", the after-text to "A", the Compare-to text to "50", and the Set-value-to text to "Must Have".

Set Field value if 'Compare to' doesn't match

This is similar to the previous rule, except that the field will be set if the data does *not* match the compare-to value.

Set Field value if no previous value was set (default)

This rule is intended as a catch-all case, for instance if you have several Set Field value rules for the same field, checking for various conditions, and then need to set the field to a particular value if none of the other checks produced a value. This is essentially defining a default value.

Note that the "previous value" it's looking for is according to the Field Descriptor, not just the same before and after text in previous rules. So if you have several rules looking for an "Electricity" value but the rules actually set different data fields (e.g. 50A, 30A, and 20A preference fields), then this doesn't act as a default for "Electricity" -- it would only act as a default for one specific field.

There is a subtle difference between using this at the end of the other comparisons and just setting the field to a fixed value as a default before the comparison rules (whereas the default field value would be overwritten if one of the comparison rules were satisfied). The key is that this particular rule does nothing unless the before and after text is located, so the field will not get set at all if the request does not have the before & after text.

Ignore Field (set position for next field)

This rule only has one parameter, the before-text, which is just the text that you're looking for to activate this rule. This rule doesn't set any fields, it just looks for the specified before-text, and if it's found then the position pointer for following rules is set to that position (on the next character after the before-text found).

Obviously this rule only has a use if there is a rule following it that has "After previous field" for where to look. It can be useful for setting a starting point, for instance if a number of fields are in a known order without unique labels in front of each one. Just locate some identifying text that comes before all of the values -- for instance the request may have a label "Address:", which is known to be followed by several lines with the pieces of the address. Use the Ignore Field rule to find "Address:", and then a number of Extract Field rules with blank before-text to read in the data fields sequentially.

Number of Characters vs. Text after field

Any rule that has "Text after field" as a parameter will also have "Number of characters" as an option. Either or both of these values can be specified, depending on what you need to do.

If the after-text is specified but the number of characters is blank (or zero), then it will simply extract all of the text between the before and after text as described in the actions above.

If the after-text is blank but the number of characters is 1 or more, then it will extract exactly that number of characters (starting after the before-text), and leave the position pointer at the next character. This is useful for parsing data values of a fixed length, especially from a string of data with no labels or field dividers. Remember that you can also leave the before-text blank, so it starts exactly where the last rule left off. Note

that if it reaches the end of the request before the required number of characters are found, it will just keep what it finds -- this can be used to just extract everything to the end of the request, for instance if there are notes of unknown length at the end, with multiple lines and no unique ending character to stop with.

If both the after-text and the number of characters is specified, then the number of characters is assumed to be a maximum. So it must find the after-text, and the position pointer will be moved to the next character after that as usual, but if the data extracted between the before and after text is longer than this maximum number of characters then it will be truncated. For instance, this can be useful to extract just a fixed part of a line but leave the position pointer starting on the next line.

General Parsing Rule Order

There are a couple restrictions for the order of parsing rules in a parsing set. Regardless of the order that the fields appear in the request text, the order of parsing rules must follow these guidelines for successful parsing:

- Reservation fields and Customer fields can be in either order and intermixed if needed. However there must be at least one Reservation field *and* one Customer field successfully parsed before a Transaction field can be parsed (due to the required linking relationship).

- If you're extracting more than one Transaction, using indexed records like Trans[1], Trans[2], etc., don't intermingle index values and keep them in order -- e.g. all rules for the first transaction must appear before any for the second transaction. See below for more information.

Indexed Records in Field Descriptors

As just mentioned above, it's possible to extract data for multiple transactions for a single reservation request. This is handy for adding memos or other items to the transactions for the reservation. This is generally used only for transactions.

To create a parsing rule to do this, you must modify the field descriptor manually, e.g. after using Browse to select the field on the Edit Parsing Rule dialog. Insert an index number inside square brackets, just before the colon of the field descriptor -- for example: "Trans[0]:Tran_Amount". The index value can start at 0, and go as high as needed. If no index value is specified, [0] is assumed.

The index values must be in order in the parsing rule list, e.g. all fields for Tran[1] must appear before Tran[2] fields, [2] before [3], etc. However you can skip index numbers if you like (to leave room for inserting others later, for instance). It's also OK if data isn't extracted for all transactions, resulting in missed index numbers. For instance if it extracts fields for Trans[1] and then doesn't find any rules (or valid data to extract) for Trans[2], it can still extract data for Trans[3]. Only the two transactions found will be used. The numbers are just a way to create separate records and indicate which fields go with which record, but the numbers themselves are not important.

When you view the Online Request Details, the indexes shown for extracted data will appear a little differently -- they will have a "+" number in front, like "Transactions[+1]". These numbers may not match the index values you use in the rules -- they will increment without gaps in the numbering.

Using "After Previous Field" for Where to Look

Aside from the general order of fields mentioned above, the order of the rules don't matter if the "Where to look" for all of your rules are "Anywhere in the text" because it will start at the beginning of the request data each time. But if you use the "After previous field" option, then naturally the rules need to be in the same order that the fields to be extracted will appear in the request data. Therefore it's recommended to use the "Anywhere" option unless there's a specific requirement for getting fields in a certain order without looking for unique text to indicate the field position.

To be more specific -- as the engine goes through the rules, it keeps track of the last position it looked at (e.g. where it found the last field's data). If you select "After previous field", it starts looking from that position to satisfy this rule (e.g. to find the "before text" for the next rule). If a rule uses "Anywhere in text", the engine starts over at the beginning for that rule.

Note that sometimes every character is important for locating data. Lets say the following text has 3 values that you need to extract, where the first number is # adults, the second is # children, and the 3rd is # pets:

      Extras: 1,2,3 (end of line)

You can do this with 3 parsing rules, each with Extract Value for the Action:

- The first rule would be a "Look Anywhere" rule, with "**Extras:**" for the before-text and "**,**" for the after-text. It would extract the value "1" which appears between the specified text (the leading space is removed). After getting that value, the text position pointer is now on the "2" (it's positioned on the character following the after-text specified in the previous rule).

- The 2nd rule would be a "Look after previous field" rule, with blank before-text (so it starts extracting immediately starting with the "2"), and after-text "**,**". So it will extract the value "2", and the pointer is left on the "3".

- Finally the 3rd rule would be another "Look after previous field" rule, with blank before-text and after-text "**\r**" (to stop at the end of the line) so it extracts the "3".

There is also a special way to position the pointer for future rules without extracting the text. This is the "Ignore Field" rule action. Specify the before-text and it will locate that text, leaving the position pointer on the next character (after the before-text it found). This could be useful in the example above if you wanted to skip the first value, for instance. The first rule would have an action of "Ignore Field", then you would insert another "Ignore Field" rule with "**,**" as the before-text. This would move the position pointer to the 2nd value ("2"), setting the stage for the next rule to extract the 2nd value.

Special Characters and Text Considerations

When entering a rule, there are certain limitations for what you can use in the before-text, after-text, compare-to and set-value-to fields (and there are some workarounds for these limitations).

- You can't enter the space character at the beginning or end of the entry fields (because leading and trailing spaces are stripped out of the dialog entry fields automatically). However if you need to have the parser actually use a space, for instance to enter a space character in the "Set value to" field that's not surrounded by other characters, you can use the hexadecimal escape sequence "**\x20**".

- You can use the **\t** and **\r** escape sequences in the before-text and after-text values to look for "tab" and "carriage return" characters respectively. For instance it's common to have "\r" for the "Text after field" setting, to tell it that the data stops at the end of the line.

- Sometimes text data includes both carriage return and line feed characters at the end of lines. All line-feed characters in the request text are removed before parsing, to make it more consistent and avoid confusion between the two characters. Therefore lines will always end in a carriage return character (**\r).** Also note that there may be more than one **\r** at the end of lines, so don't assume only one will be there when setting up parsing rules.

- When text is extracted (e.g. from between the before-text and after-text), any carriage return or tab characters are converted to spaces (because Campground Master data fields cannot contain control characters). In addition, leading and trailing spaces are removed from the parsed text before doing any comparisons -- keep this in mind when setting a "Compare to" value -- the extracted text being compared would never contain the carriage return (**\r**) or tab (**\t**) characters, and it could not start or end with a space.

- Before-text and After-text values **are** case sensitive and must be entered exactly as they will appear in the request text.

- For the Compare-to actions, the comparison is **not** case-sensitive (e.g. the compare-to text "tent" will match "TENT" in the request).

- Text in Set-value-to is naturally case sensitive (the data field will be set to exactly that text -- after any spaces are trimmed from the ends of course).

Requirements for a Valid Reservation Request

Regardless of the actual rule definitions used, a Parsing Set is "complete" as long as it contains rules that result in the following fields being extracted from a given request:

> **Reservation : First Night**
> **Reservation : Last Night**
> **Customer : Last Name**

That's the minimum amount of information needed for a reservation to be created, so your parsing rules need to at least get this information from the request text. Ideally you want to get as much information out of the request as possible, though, as long as the format is reliable enough to avoid getting false information.

Note that the pseudo-field "Departure Date" or "Number of Nights" can also be used to get the Last Night value.

In addition, an **Online Request ID** must be present, either found by default or extracted using a parsing rule. The logic is as follows:

- For E-mail requests, it looks for the "Message-ID" header and will use that for the request ID by default.

- You can also set up a parsing rule to set the online request ID, which will override any extracted from the Message-ID. You may want to do this to get a specific ID from the request itself for later reference, or you may need to do it if you have to paste text to process that doesn't have the E-mail header information.

- If no request ID is found or parsed, an error will be shown. The request cannot be saved as a real reservation without an ID, but if you view the request you can enter a request ID manually (just be sure to use something unique that would never match an ID from another request.)

Default Field Values

Reservations - Several reservation fields will be set to default values if they're not parsed out of the data:

Confirmation # - uses the formatting rules specified in online setup
Status - set to "Pending" unless the Guarantee Info field is filled in, then it will be "Guaranteed"
Reservation Type - set to the default specified in Program Options
Date Made - set to the current date
Time Made - set to the current time
Operator Made - set to the current operator, or the default specified in the online setup

Transactions - If the request includes any transaction information (for instance a deposit amount), then you can also create one or more transactions for the reservation. The only value you actually need to create or extract is either the Each amount or the Total for the transaction. The rest of the fields will default as follows, if they're not explicitly set by the rules:

Transaction Type - set to "Deposit"
Transaction Category - set to the same as Transaction Type (e.g. "Deposit")
Quantity - left empty
Each - set to the same as the Total amount, or Total / Quantity if there's a quantity
Total - set to the same as the Each amount, or Each x Quantity if there's a quantity
Receipt # - set using the normal formatting for receipt #'s
Description - set to the default specified in the online setup
Payment Method - set to the default specified in the online setup
Operator - set to the current operator, or the default specified in the online setup
Date - set to the current date
Time - set to the current time
Shift - set to the current shift

Note: If you have parsing rules for transaction fields but the resulting Total is zero after parsing, then the transaction will not be added to the reservation.

Duplicated Fields

When making a reservation manually, some values you enter are automatically copied to matching fields in both the Reservation and Customer records. However this does not happen for online reservation parsing, so the following fields need to have duplicated rules for the associated Reservation and Customer fields if you want the data to be set in both places:

 # Adults
 # Children
 # Pets
Extra Vehicles
Extra Trailers

Exception -- the Guarantee Info field is copied from the Reservation to the Customer automatically.

Also note that the **Discount Used** reservation field is normally copied into the next available customer Discounts field (#1, 2, or 3) when entering manual reservations. Since this complication isn't possible when parsing, just extract the reservation's Discount Used field. The next time you enter Transactions, the discount will be carried over automatically to the customer as appropriate.

In general it's OK to parse the same text multiple times, or even set a data field value multiple times. If a field is parsed out that already had a value, the new value will replace the old one unless the "Append" option is specified.

Pseudo-Fields

There are several "fake" fields that can be used to help get the data parsed into useful values. These pseudo-fields appear in the list of fields in the Select a Data Field dialog (at the top, above the normal fields). These special fields are described below, noting any special handling that can be done.

In general you can use a parsing rule to extract text from the request into a pseudo-field instead of a real data field, to handle special formats that the request might use. The engine will do further processing on that text to set the real Campground Master data fields appropriately.

"Append" option note -- In all but a few cases, the Append option in a parsing rule is ignored for pseudo-fields because of the special processing these fields already do. The special cases are the pseudo-fields for credit card number, date, and name. These allow appending because there are so many possible formats the credit card information might be sent.

Customer Pseudo-fields:

- **First and Last Name** -- Use when the whole name is in one string, like "John Smith". Assumes the last word is the Last Name, and the rest is First Name(s).
- **Last, First Name** -- Use when the name is in one string with the last name first. If a comma is not found, the first word is assumed to be the Last Name and the rest is First Name(s).
- **City, State, Zip** -- Use when the string is the whole bottom address line with all three of these. It will put them into the separate data fields.

Reservation Pseudo-fields:

- **Departure Date (Last + 1)** -- Use when the departure or check-out date is present instead of the Last Night.
- **Number of Nights** -- Use when there is no last night or departure date present, just the number of nights. Note that a rule to extract the First Night must appear prior to this one.
- **Number of sites requested** -- If the request could be for more than one site, set this field so it knows how many linked reservations must be created.
- **Unit ID from E-mail requests** -- Use for E-mail requests if the request contains a special ID, not the same as a site number (see Online Setup -- Site Data Fields)
- **Unit Type from E-mail requests** -- Use for E-mail requests if the request contains a unit type, not the same as a site type (see Online Setup -- Site Data Fields)
- **Unit ID from Reservation Friend** -- Use for Reservation Friend requests for the site name sent in their reservation data (see Online Setup -- Site Data Fields)
- **Room Name from Webervations** -- Use for Webervations parsing, to get the room name to be matched up with the Webervations Name (see Online Setup -- Site Data Fields)
- **Unit Class from Webervations** -- Use for Webervations parsing, to get the unit class to be matched up with the Webervations Class (see Online Setup -- Site Data Fields)
- **Credit Card # (Guarantee)** -- To extract the credit card number for the guarantee information (these are pseudo-fields because the credit card info is stored in the Guarantee Info fields in a special format, not as separate fields).
- **Credit Card Name (Guarantee)** -- For the credit card name.
- **Credit Card Exp Date (Guarantee)** -- For the credit card expiration date as one string. Will accept several formats, like 0705, 7/05, 07/05, 7/31/05, or 7/31/2005.
- **Credit Card Exp Month (Guarantee)** -- For just the month part of the expiration date, if it's a separate field.
- **Credit Card Exp Year (Guarantee)** -- For just the expiration year as a separate field.
- **Credit Card CVV (Guarantee)** -- For the CVV/CVC2 code on the credit card.

Transaction Pseudo-fields:

- **Credit Card #** -- (same as for reservation fields above).
- **Credit Card Name** -- (same as for reservation fields above).
- **Credit Card Exp Date** -- (same as for reservation fields above).
- **Credit Card Exp Month** -- (same as for reservation fields above).
- **Credit Card Exp Year** -- (same as for reservation fields above).
- **Credit Card CVV** -- (same as for reservation fields above).

Parsing Set Example

The best way to learn how to set up parsing rules is to do an example. Below is an example of how a reservation request might be E-mailed to you from a form submission on your web site.

> E-mail Subject:
> Form : Big River Reservation Request (Joe Public)
>
> E-mail Text:
> NAME=Joe Public
> ADDRESS=4035 Main
> ADDRESS2=
> CITY=Gardiner
> STATE=NY
> ZIP=43558
> PHONE=8884148384
> EMAILADDR=joepublic@aol.com
> UNIT_TYPE=Full Hookup : 50A
> NIGHTS=3
> ARRIVAL=03/10/2005 about 10:00 pm
> EXTRA=0301020001
> SPECIAL_REQUESTS=Need pet area
> OTHER_NOTES=We will arrive after dark

Parsing Set

Of course to start a parsing set definition, go to Maintenance / Online Setup / Online Reservations - Parsing Sets. Then click "New parsing set definition".

Give it a Set name, for instance "Big River website", to denote where the request is from.

Enter the Identifying text -- in this case, use "Form : Big River Reservation Request" for the identifying text. Web site forms usually let you specify a subject, or at least part of it will be what you specify for the form. The key is to make this subject unique enough that the chances of receiving any other E-mail with that text in it would be very slim. In this case, the fact that the subject starts with "Form : " helps a lot in making it distinctive.

Parsing Rules

Now you can add the rules using the Add New Rule button.

Below are the essential elements to be defined in the parsing rules. Most of it should be straightforward, but notes are added where clarification may be needed. Click Save after each rule to save it and get back to the Parsing Set dialog, then Add New Rule to add the next rule.

Unless otherwise noted, assume that the "Append..." option is *not* checked, and the "Trim any extra..." option *is* checked. The "Convert to Mixed..." and "Convert to UPPER..." options are set to your preference.

Rule 1:
> Where to look: **Anywhere in text**
> Parsing Action: **Extract Field value**
> Text before field: **NAME=**
> Text after field: **\r**
> Number of characters:
> Field descriptor: **Cust:Cust_First_And_Last** (Browse, "Customers" data table, "First and Last Name")

This grabs everything on the line following "NAME=" (remember that "\r" is a special escape sequence meaning the end of the line, so it will stop extracting there). The pseudo-field "First and Last Name" is used, so it converts the extracted text into the separate First Name and Last Name customer fields.

Rule 2:
> Where to look: **Anywhere in text**
> Parsing Action: **Extract Field value**
> Text before field: **ADDRESS=**
> Text after field: **\r**
> Number of characters:
> Field descriptor: **Cust:Cust_Address_1** (Browse, "Customers", "Address Line 1")

This locates the address line and grabs everything on that line after the "ADDRESS=". This might also work if the "Where to look" was set to "After previous field", but sometimes submissions from web site forms don't put fields in order so it's safest to just tell it to look anywhere in the text.

Rules 3 through 8:

These rules will be the same as rule 2, just changing the text before and the field descriptor to get each part of the address, phone number and E-mail address.

Rule 9:
> Where to look: **Anywhere in text**
> Parsing Action: **Extract Field value**
> Text before field: **UNIT_TYPE=**
> Text after field: **:**
> Number of characters:
> Field descriptor: **Resv:Resv_Online_Email_Type** ("Reservations", "Unit type from E-mail requests")

Note that the "Text after field" entry is actually the colon character (**:**), so we're stopping before the end of the line. While this isn't typical for web forms, in this example we're assuming that the data in this line has the unit type followed by an option for whether they want 50A service. (Presumably if they didn't need 50A service, it would have been something like "Full Hookup : 30A".) So we stop at the colon for the unit type, both to ignore that part for matching the unit type field and also to prepare for getting the 50A option in the next rule.

Also note that we're using the pseudo-field "Unit type from E-mail requests". This is not the same as the Site Type used many other places in Campground Master. It's not a good idea to use the normal Site Type field because if you decide to change the wording in your Site Type pick list, the online reservation parsing wouldn't work anymore. Therefore there is a separate field for each site which specifies the "Unit type" you expect to retrieve from E-mail requests. So when you set up your web form you only need to be sure that the selections offered for this field match up with the values used in this special Site data field.

Rule 10:

>Where to look: **After previous text**
>Parsing Action: **Set field value if 'Compare to' matches**
>Text before field:
>Text after field: **\r**
>Number of characters:
>Compare to: **50A**
>Set value to: **Must Have**
>Field descriptor: **Resv:Attrib_50A** (Browse, "Reservations", "50A")

As mentioned above, we're expecting this option to follow the unit type, on the same line. Since we already "used" the colon character as the after-text in the previous rule, it won't see it for this rule. So we leave the Text before field blank to start extracting immediately. Then we stop at the end of the line as most other rules do. After any extra spaces are trimmed, the extracted text should be either "30A" or "50A".

The other difference in this rule is that we're not just extracting a value. Since the 50A option is a reservation preference field, it must be set to "Must Have" in order to show that preference. So we use the comparison rule and set the field only if the extracted text is "50A".

Rule 11:

>Where to look: **Anywhere in text**
>Parsing Action: **Extract Field value**
>Text before field: **ARRIVAL=**
>Text after field: **\r**
>Number of characters: **10**
>Field descriptor: **Resv:Resv_First_Date** (Browse, "Reservations", "First Night")

We're assuming that the date in this field will always be in the form MM/DD/YYYY, and that it might have an arrival time after it but we don't care to get that part. So since we know the date will be exactly 10 characters, starting immediately after the '=' character, we tell it to extract to the end of the line but just keep the first 10 characters (the date).

Of course this would normally be a little risky since it's not often that date formats can be relied upon to be so precise, but we're just illustrating how the number of characters might be used to specify a maximum, throwing away any extra information.

Rule 12:

>Where to look: **Anywhere in text**
>Parsing Action: **Extract Field value**
>Text before field: **NIGHTS=**
>Text after field: **\r**
>Number of characters:
>Field descriptor: **Resv:Resv_Number_Of_Nights** (Browse, "Reservations", "Number of Nights")

This may seem to be just another extraction rule, but there is something special about it.

Notice that this rule and the previous one are not in the order that the respective form fields appear in the request data. Of course we can normally put a rule like this anywhere since we use "Anywhere in text". However in this case it *must* be after the rule that gets the First Night, because we're using the "Number of Nights" pseudo-field. This pseudo-field won't work unless the parsing engine already knows the starting date of the reservation, so the rules must be in this order.

Rule 13:
        Where to look: **Anywhere in text**
        Parsing Action: **Extract Field value**
        Text before field: **EXTRA=**
        Text after field:
        Number of characters:2
        Field descriptor: **Resv:Resv_Adult** (Browse, "Reservations", "# Adults")

This is an example of getting a precise number of characters, and preparing to continue with more characters in the next rule. We're assuming that the EXTRAS field actually contains a 10-character string of data in the form: AACCPPVVTT, where AA = # adults, CC = # Children, PP = # pets, VV = # extra vehicles, and TT = # extra trailers. So in this rule, we find the starting point and get 2 characters. We leave the after-text blank so it leaves the position pointer on the next character in the data we need (the first 'C' in the format).

Rule 14 through 17:
        Where to look: **After previous field**
        Parsing Action: **Extract Field value**
        Text before field:
        Text after field:
        Number of characters:2
        Field descriptor: **Resv:Resv_Children** through **Resv:Resv_Trailers**

The next 4 rules continue getting 2 characters for each of the other #-of fields. We're looking "After previous field" for each one, and both the before-text and after-text are blank. So all it does is get 2 characters and move the pointer up 2 characters for the next rule.

Rule 18 through 22:
        Repeat rules 13 through 17 exactly, but for the fields **Cust:Cust_Adult** through **Cust:Cust_Trailers**

Since we also want to save the #-of information in the customer's details (so we have it for future reservations), we need to extract the same data again for the customer record. Remember to use "Anywhere in text" for the first rule to reset the pointer and look for the "EXTRA=" label again, then continue with "After previous field" for the following ones.

Rule 23:
        Where to look: **Anywhere in text**
        Parsing Action: **Extract Field value**
        Text before field: **SPECIAL_REQUESTS=**
        Text after field: **\r**
        Number of characters:
        Field descriptor: **Resv:Resv_Notes** (Browse, "Reservations", "Notes")

This is straight forward, just putting their special requests in the Notes field so we can see it when processing the reservation. But in this case we have more than one thing that we want to go in the notes, so pay attention to the next couple of rules.

Rule 24:
  Where to look: **Anywhere in text**
  Parsing Action: **Set Field to a fixed value (always)**
  Set value to: \x20\\\x20
  Field descriptor: **Resv:Resv_Notes** (Browse, "Reservations", "Notes")
  Append to any previous text for the same field: **CHECKED**
  Trim any leading and trailing spaces from the value: **NOT CHECKED**

We're using a fixed-value field here, not to actually set the whole Notes field, but to add text on to it (because the Append option is checked). What we're doing is putting separation between any notes that might be in the special requests item above and the other notes item we'll extract next.

Also note the value we're setting it to. It contains the escape sequence for a "space" character, \x20, at the beginning and end. This will actually convert to " \\ " (note the spaces on each side of the back-slashes). Because we want to keep those spaces, we also need to disable the Trim option.

By the way, the reason we're using this odd " \\ " separator is because that's recognized by the program as a new-line when viewing the Notes. Campground Master data fields can't normally contain actual carriage-return characters (and they would be stripped out anyway), so this special sequence is used. For instance, when you go to Reservation Details you may see the \\ characters like this in the Notes line, but if you click the "..." button next to the Notes field, a multi-line window will open. In there, the lines will be separated the way we want them. This also happens when you double-click on a reservation in the Rack to show the Quick-info.

Rule 25:
  Where to look: **Anywhere in text**
  Parsing Action: **Extract Field value**
  Text before field: **OTHER_NOTES=**
  Text after field: **\r**
  Number of characters:
  Field descriptor: **Resv:Resv_Notes** (Browse, "Reservations" Data table, "Notes")
  Append to any previous text for the same field: **CHECKED**

Again we're basically just extracting text, but telling it to just append the extracted text to the end of the Notes field instead of replacing it. So now we'll have the results of the last 3 rules all in the single Notes field.

Testing the Rules

If you're following along and entering the rules above, you can use the Save & Test Parsing Set function to see if they've been entered right. If you're viewing this documentation online or through the Help function, you can just copy the sample request above and paste it into the test window. Otherwise you'll need to type it in. Don't worry, it will save what you type so you don't have to do it over each time you want to test it.

Online Setup - Site Data Fields

This function opens a dialog to set up fields for each site which are specific to online reservation handling. 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). Of course this might not be a problem, depending on which online functions you need to use and which fields are required.

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.

Field Descriptions

Some basic field information is given here, but refer to the examples for more detail. Also refer to the Online Reservations Setup -- Data Fields Used section to see which fields you should enable.

For E-mail request processing:

Email Req. ID -- The site name or number you expect in E-mail requests for this site, which can be different than the Site Name for the sites. For instance, the name might be "RV Site 1", but in the E-mail requests it might be shown as "RV1".

E-mail Req. Site Type -- If requests will be made by the type of site rather than specific site numbers, you can set this to the expected value from the E-mail requests.

For Exporting to a web vacancy grid (on your own web site):

Exclude from Export to Web -- Set this to "Yes" if you want to exclude the site from the online vacancy grid. "No" and blank have the same result.

Export to Web Release Days -- Specify how many days ahead of time that the site should be removed from online availability. Leave it blank if it should always be considered available for both online and offline reservations. Enter 0 if it should never be available offline (locally), and always available for online reservations. See the section Online Connections -- General for more information on release days.

For Reservation Friend processing:

Res. Friend ID -- The site name or number you expect in the E-mail reservation data for this site, which can be different than the Site Name for the sites. For instance, the name might be "RV Site 1", but in the Reservation Friend data it might be shown as "RV1". Naturally these must match up with the information you set up on the Reservation Friend service. Note that this only has to be entered for the sites you make available for reservations on Reservation Friend. Leave it blank for sites not listed in their online service.

Res. Friend Release Days -- Specify how many days ahead of time that the site should be removed from online availability. This should agree with the configuration in your Reservation Friend account! Leave it blank if it should always be considered available for offline reservations (e.g. for sites not set up on Reservation Friend). Enter 0 if it should never be available offline (locally), and always available for online reservations (e.g. if it's never released from Reservation Friend even on the current day). See the section Online Connections -- General for more information on release days.

For Webervations requests and availability upload:

Webervations Name -- This is the "Room Name" from Webervations for this site. It doesn't have to be unique for each site -- for instance it could be more like a site type, if you're not setting up Webervations to be site-specific. It must of course match the room name given for the site on Webervations, but for instance you can specify on Webervations that the room "Cabin" has 20 units available. Thus you would enter "Cabin" as the Name here (and ID, below) for all 20 cabins.

Webervations ID -- This should be the same as the Webervations Name to work properly with the availability upload for Webervations.

Webervations Class -- This is the "Unit Class" from Webervations. Often this is just "Default", but if you have multiple classes set up then enter the appropriate value here.

Exclude from Webervations -- Set this to "Yes" if you want to exclude the site from Webervations availability. "No" and blank have the same result.

Webervations Release Days -- Specify how many days ahead of time that the site should be removed from online availability. Leave it blank if it should always be considered available for both online and offline reservations. Enter 0 if it should never be available offline (locally), and always available for online reservations. See the section <u>Online Connections -- General</u> for more information on release days.