1 Version 4.0 Release Notes

These release notes list all changes since the version 3.6 release.

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 **6 / 2006**. To check your free-upgrades license expiration date, go to View / Product Authorizations 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 users note: If you're still using the demo or trial of Campground Master, be aware that the sample database file, "Demo", **will be overwritten** when you install the upgrade. If you have changes to the demo you want to save, make sure you make a backup (Maintenance / Back Up Database) and/or use File / Save As to save it to a different filename.

Changes in this release:

- **Changes implemented** -- Changes since 3.6.
- **Fixes implemented** -- Bugs fixed since the 3.6 version release.

Custom Reports & Forms, Dialogs, Menus and Event Handlers

The changes related to these new customization features are mentioned briefly here, but full documentation is separate from this release note. You can find the documentation in the Help Topics of the new version (under Maintenance / Advanced Customizations), or you can download it as a separate PDF file and print it out (it's currently about 80 pages). The PDF file can be found here: http://campground-master.com/zip/reports.pdf

2 Changes implemented

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

- **Custom Queries -- This is one of the major new functions, which allows for customized reporting.** (See Maintenance / Advanced Customizations / Queries.) A "Query" is basically a user-defined grid report, either a list report like the Arrivals tab or a cross-table report like a Transaction tab summary report. If any custom queries are defined, a "Query" tab view will also be available where you can select any query to view and enter an appropriate date range. Queries also allow "Search text" to be entered using the F9 key, so they can be used for customized look-up functions. A number of sample queries can be imported (see the Help for Queries Setup for details).

- **Custom Forms -- This is one of the major new functions, which allows for customized receipts, letters and other forms.** (See Maintenance / Advanced Customizations / Forms.) Generally a form is specific to a single reservation or customer, but technically can be based on any type of record, or even be a static form like a blank registration card or general letter. A number of sample forms can be imported which mimic the "canned" receipts, so you can use those to make minor changes (see the Help for Forms Setup for details).

- **All default "receipts" are now defined as forms**, so you can select which ones are enabled (selectable to print), rearrange the order, or even delete ones you won't use. You can also add custom elements to the standard receipts, like a logo.

- **Multi-page receipts are now supported** -- When there are too many transactions to fit on one page, the receipt will print on multiple pages.

- The "Print" button in the details/editing dialogs for Customers, Reservations, Sites, Parks, Inventory Items and Vendors now opens the Form Selection dialog instead of just printing the record in a grid. The option to print the grid is still there, but you can also choose to print any Form defined for that type of record. (This does not include "Receipt" forms for customers or reservations -- the New/Edit Transactions dialog must still be used for those, since more options are available for which transactions to print.)

- The "Print List" option in the dialogs for Find Reservations, Find Customers, Find Inventory Items, and Find Vendors is now "Print List / Forms". This will open a Form Selection dialog so that a custom form can be printed for each selected record.

- A "Print a Form for selected..." button has been added to Sites Setup, Inventory Items Setup, and Vendors Setup. This will open a Form Selection dialog so that a custom form can be printed for each selected record.

- The right-click menu items and Report menu items for printing Envelopes and Labels now say "Customer Labels" or "Customer Envelopes or Forms". The latter selection also allows choosing "Other" types of forms to print besides just envelopes. The word "Customer" was added to be more specific, since they refer to the Customers involved, not Reservations.

- The "Reservation Receipts (batch)" menu item in Reports is now "Reservation Receipts or Forms", which now allows choosing other custom form types besides just receipts.

- **Color Scheme definitions** -- Custom color schemes can be defined to override or supplement the normal coloring of reservations or any data in a custom query. In addition, header rows and columns can use a color scheme, for instance to change the Site color on the Rack depending on the site type. See Maintenance / Advanced Customizations / Color Schemes.

- Default Global Color definitions -- Global default color schemes can be selected for reservations and the map view, which will be used everywhere the default would typically be used (tab views, etc.). You can also select custom color schemes for Rack headings and empty sites. See Maintenance / Advanced Customizations / Select Global Color Schemes.

- Expression engine for customization -- When creating any custom forms, queries, or color schemes, you'll define the elements as "expressions". These are basically formulas which can include data fields, calculations, text manipulation, or even create complete Scripts (small programs) to extract the necessary data. These are similar to creating formulas in spreadsheets or Microsoft Access. You can also create Macros for commonly used expressions, for easy re-use.

- **Tab views -- Which tab views are shown, what order, and what they're named is now completely configurable** (See Maintenance / Advanced Customizations / Customize Tab Views). The default list of tab views is added automatically. However if your screen resolution is low then you might need to adjust the names so that they'll fit on your screen without the need for scrolling.

- **Tab views -- For each report tab, an Add-on Query can be selected in the Options.** This allows additional columns to be added besides the fields that are listed as checkboxes. In the Rack tab the columns will be added as "headers" on the left, and you can also select a query to be added as one or more rows under the date headers. In other tabs, the query columns are added to the right of any other columns.

- Tab views -- You can now disable any of the standard fields (previously a few "default" fields like Site and Last Name could not be disabled). Likewise, the Site column and Date header can be disabled on the Rack, allowing a query to be added as a completely custom header.

- Access Levels -- The access levels for viewing and printing tab views have been removed, since this is now defined in the tab view customizations above.

- **Data Field Definitions -- The names of the field elements have been changed for better consistency with what they're used for.** Note that whatever text was in Normal Header is automatically copied to the new Short Label, Field Name, and Report Heading text when upgrading, to minimize any effects on existing functionality. However this may affect some views/reports where attribs/prefs are used, since the abbreviations are replaced with the longer "Field name".

Used to be:	Now:	Notes:
Abbr	Short Label	Used for dialog entry field labels
Normal Header	Field Name	Used in field-selection lists (e.g. for setup functions)
Long name	Report Heading	Used for column headings in reports & labels on receipts
Description	Notes	For reference only.

- **Pick-List definitions -- The names of the pick list elements have also been changed.** Again, whatever was in the Normal Text is copied to both the Selection Name and Report Heading, to keep the upgrading effects minimal.

Used to be:	Now:	Notes:
Abbr	Abbr	Used when a short name is needed, e.g. 'Type' on the Rack
Normal Text	Selection Name	Used in selection lists and for values on receipts & reports
Long	Report Heading	Used for row headings in reports and the Shift report
Description	Notes	For reference only.

- **Data Field Definitions -- Added the ability to add your own fields to the data tables.** (As of the beta 1, the new fields can be used in queries, forms, etc. but there is no way to add them to the data entry dialogs -- this will be added later.)

- Data Field Definitions -- Added a Justification column (left, center, or right), which defines the default justification of the field when shown on grid reports and tab views.

- **Data Field Definitions -- The default justification has been changed for a few fields, which will affect the look of some reports**: The fields Site Type, Reservation and Transaction dates, Reservation Type, and Reservation Status may be aligned differently than before.

- **Reservations -- Added "No Show", "No Stay", "Mistake" and "Other" status choices as 4 new types of 'Cancelled', in addition to the "Cancelled" option.** You can choose the type of cancellation when you cancel a reservation. This affects functions in the following areas:
  - The checkbox on Reservation Details shows the current status if it's cancelled.
  - Clicking the checkbox allows changing the status, instead of undoing the cancel.
  - The right-click menu item is changed from "Undo..." to "Change Cancellation Reason".
  - The Non-reserved tab view has the new selections added.
  - The Unfulfilled reservations report has the new selections added.
  - In all other respects, the new status choices act the same as "Cancelled".

- Transactions data -- A new "Extra Info" field has been added, and any automatically-added info has been moved out of the "Check # / Ref" field to this new field to avoid confusion. Now the Reference field can be added to the Transactions tab view without showing all of this extra info, so the check # can be seen more easily.

- QuickBooks Export -- Added the option to add the Payment Method for receipts transactions (Cash, Check, etc.). This is so that the payment method for each entry will be shown when doing the Deposits function in Banking. Note that this uses the pay method names form the Pick List, there is no option to map them to different names for QB. (QB will add any unrecognized names automatically.)

- E-mail Confirmation -- If more than one E-mail form is defined in Forms setup, the user will be given a choice of which one to use each time.

- Printer Settings -- Instead of loading all printer settings on start-up, they are only loaded when needed. In some systems this will speed up the initial program start-up, but may add a small delay when printing for the first time.

- Printer Setup -- Added 4 "Custom" printer settings, for use with custom form definitions.

- Printer Setup -- Added a separate printer setting for the Map view.

- POS Inventory Setup - A column for Park will be shown if multiple parks are defined in the system

- Networking -- Improved some network error message to provide more detail, and added more diagnostics messages.

- Search function (F9) - if "OK" clicked (or Enter key) with no text entered, it will go to the top of the tab view. This is a quick way to jump to the top.

<u>Changes since beta 1:</u>

- **The "Reports, Forms & Scripts" menu item (from beta 1) has been changed to "Advanced Customizations".**

- Color Key -- if a scheme is selected as the default for Reservations or Map colors, its colors & rules are shown in the Color Key dialog and can also be edited directly from there.

- When importing records (forms, queries, macros, scripts, etc.) avoid duplicate names and show a warning if there are any renamed due to duplication.

- Rack view - You can right-click on a date in the top row to get a menu, which has a "New reservation for this date" function.

- **Custom Menus -- This is one of the major new functions, which allows for customized menus throughout the system.** (See Maintenance / Advanced Customizations / Menus.) Almost any of the drop-down or right-click menus in the system can be customized with additional functions (through expressions), including sub-menus any number of levels deep. Existing functions in the menus can also be conditionally renamed or deleted.

- **Custom Dialogs -- This is one of the major new functions, which allows for customized dialogs (data input screens).** (See Maintenance / Advanced Customizations / Dialogs.) The main data entry dialogs can be customized to a large extent -- new fields can be added, existing controls can be disabled, deleted, moved or renamed, and the dialog can be enlarged. Additional actions can be taken when any control is activated (e.g. button clicked, edit field changed, etc.). Completely new data entry dialogs can also be added and displayed when a button is clicked, or through a custom menu, etc.

- **Custom Event Actions -- This is one of the major new functions, which allows you to make things happen upon certain conditions.** (See Maintenance / Advanced Customizations / Event Actions.) There are many events that can be "trapped", e.g. reservation check-ins, editing customers, etc., and you can define an expression to execute before or after the event (optionally preventing the normal action from taking place). This can be used to define reminder messages when someone checks in, or reservations made on certain dates, etc., as well as periodic functions to happen automatically like checking for online reservation requests.

- Added an "Import Package" function under Maintenance / Advanced Customizations. This is similar to the Import functions within the various setup dialogs, e.g. Forms Setup, but it can import multiple customization features at once (e.g. a whole "package" of dialogs, menus, forms, etc.), for instance if you have extensive customizations created for you.

- When Tab Views are printed, the From & To dates are not included in the heading with the report name

- Any applicable custom fields added to Reservations or Customers are included in Find Reservations / Find Customers so they can be searched.

- Custom Forms -- If it's an E-mail form, the Subject can also be set using an expression, overriding the default from the SMTP setup.

- Credit Card "Void" -- A credit card slip will print showing the voided transaction, if the options are set to automatically print a credit card slip.

- Reservation Transactions -- Allow any selected receipt to be printed for the specific reservation selected in the top list (this was only allowed for Window tags before).

- Many new Expression functions have been added for use in event actions, dialogs, menus, etc -- check online requests, upload online availability, log in & out, make backups, set the status bar text, send E-mail, open the cash drawer, set the pole display text, show a query report, open a custom dialog, get and set values in dialog fields, manipulate dialog controls, etc.

Changes since beta 3:

- Rates -- allow additive combinations to be selected in the "Applies if reservation field", for instance "# adults + # children", for a simple way to charge for # extra people.

- Added access level settings for cancelling a reservation (a separate setting for each of the 4 new cancellation types), and for changing the cancellation reason.

- **Confirmation letter summary format and E-mails - Include Payment transactions as well as Deposits in the "Deposit paid" amount.** (This may affect your confirmations if you use Payment instead of Deposit.)

- **Confirmation letter summary format and E-mails - Only show "Balance due" if it's greater than $0.** (This may affect your confirmations by not showing negative or zero balances.)

- Added a setting (in Program Options / Functions), "Automatically retrieve previous credit card information", which is enabled by default to keep the same functionality but can be disabled if you don't want it to show previous credit card information.

Changes since beta 4:

- Rates definitions -- Added "Advanced Condition Expression" so that more complex rates qualifications could be done.

- Operators -- Allow multiple operators with the same Operator Login, using the Password to identify which operator is logging in if necessary.

- Events -- Added event triggers for Select Rates, Auto-rates, Monthly billing and Meter auto-charges. This could allow the transactions added by the rate to actually be modified as they're added to the reservation, making it possible to use more complex formulas for the rates or modify descriptions, etc. using complex expressions.

- Change to another Customer function (for reservations) -- If a customer's last name is entered in Find Customer but Add New is selected, use the last name in the new customer entry dialog so it doesn't have to be re-typed.

- Added an option (in Program Options / Database) to Include Map images and Form bitmap files -- With this option enabled, any map image files used (through Maps Setup) and any bitmap files used on custom Forms are included in all compressed backups, and will be automatically restored if a Restore is done to an existing database.

- Cross-table queries -- added a Group Headings Conditional Expression to each axis, e.g. for "Records of a table" you can add a condition that determines which records actually get included. Likewise for Dates you can exclude certain dates, and for Items of a pick list or fixed list you can exclude certain items.

- Don't Move flag -- or linked reservations, only synchronize initially, but treat separately afterwards so individual sites can have the flag set or not set while still being synchronized.

- Added access level settings for:
- Delete manual transactions on the same shift/day (defaults to Clerk)
- Delete auto-charge transactions on the same day, before check-in (defaults to Clerk)
- Delete auto-charge transactions on the same day, after check-in (defaults to Manager)

- Updated U.S. Zip Code and Canada Postal Code data.

Changes since beta 5:

- Splitting deposits can be done for any non-synchronized reservations, not just Group reservation types.

- Dialog customizations - Added expression functions to get the previous control that had focus, to help when using the get/lose focus actions to detect and alter the tabbing order of a dialog.

Changes since beta 6:

- **Added functionality to allow selecting specific transaction categories for payments** (and refunds), particularly for adjusting the Receipts by Category reporting. This must be enabled through Maintenance / Program Options / Prompts. A category list will appear on the Enter Payment dialogs for easy category selection, or you can "Split Categories" to allocate the payment in various amounts to multiple categories. Categories for previous payments can also be changed by selecting the payment in the Reservation Transactions dialog and clicking the "Edit Category Allocation" button that appears.

- Auto-Rates -- added an option to add the rates upon check-out instead of check-in or creation.

- Payments Due Options -- Added an option to include linked sub-member or synchronized reservations. This is disabled by default, so only the main reservation of a synchronized or sub-member set is included (since the others would not have deposits or payments anyway). To get the results of previous versions, this option needs to be selected.

- **Map site indicators** -- The font and size of the text can now be selected for each site indicator element, as well as the orientation angle to allow diagonal or vertical site numbers in the indicators.

3 Fixes implemented

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

- Export to Web -- Change so does not skip showing a site just because it's unavailable for the whole month. You can still exclude the site if desired, using the site selections.

- POS Inventory and Vendor editing -- Fixed a bug causing it to incorrectly report that a record is already open for editing.

- **Rates Setup -- Fixed a serious bug where deleting a rate with schedule periods will also delete the periods associated with it, and copying will create extra periods records.**

- Raw Data Tables -- Fixed a lockup bug if text is pasted to multiple non-contiguous cells.

- Transactions tab view -- Fixed a crash if a non-reservation transaction is double-clicked on the Transactions tab view.

- **Auto-Rates -- Fixed so is works properly with an add-on rate that is always added on, e.g. the simplest case of no conditions.**

- Guest management, adding new guest -- Make sure start date is not earlier than the reservation start date (but default to today otherwise). Also fix so the start date can't be after the last date (e.g. when adding guest to prior reservation).

- **Retrieving online reservations -- The timeout for E-mail retrieval has been increased to 5 seconds to solve some time-out issues.**

- **Added portfolio-link checking to the "Repair <bad link>s" function in Database Maintenance, to check for problems with linked reservations.**

- Importing -- fixed to handle empty rows properly, gracefully handle unmatched quotes in the data, and handle rows with more columns anywhere in the data (instead of assuming the first row has the maximum number of columns). This handles QuickBooks customer importing more easily.

- Credit card slip -- Fixed so it doesn't print out all of the reservation's additional sites on it for linked reservations.

- Window Tag -- Fixed so it will shrink the Site name's font size to make it fit, instead of cutting it off.

- Importing and Online Reservations -- fixed to recognize a date format like 12-Apr-2006 in non-US installations.

<u>Changes since beta 1:</u>

- E-mail sending (SMTP) -- Fixed so names with commas are treated correctly as a single name, not separate E-mail addresses.

- State/Province field -- Fixed so it doesn't automatically remove all spaces & punctuation.

- Reservation Friend online reservations -- Fixed the default parsing rules so it handles multiple sites (in separate E-mails) correctly

- Guaranteed reservations -- If a reservation is automatically guaranteed due to a deposit being entered, any synchronized reservations are also guaranteed.

- Locking reservation & customer information -- For linked reservations, only lock the records for the linked reservations when absolutely necessary (e.g. if non-synchronized, don't lock the others when just checking in or adding transactions). This allows members of a group to be checked in at separate workstations simultaneously.

- A rounding issue has been fixed for some specific cases where a computation should result in exactly $.005 (half cent) but was being rounded the wrong way. (****** NOTE:** This may affect prices/rates that calculated to a half cent amount but were rounding down instead of up)

- Direct-to-Port printing to serial ports -- an initialization issue has been fixed (the port was not being initialized until a cash drawer command was sent).

- When change is due, the receipt will now start printing before the "Change Due" window is shown.

<u>Changes since beta 2:</u>

- Receipts by Category report -- fixed the interpolation of customer transactions (e.g. payments made to the customer), to avoid incorrect amounts in Uncategorized. Note that this may affect old reports!

- SMTP settings for sending E-mail -- Fixed to keep the "Bind to" settings local to each workstation, so it works properly when not set to "Any".

- Fixed auto-rates calculation to add the site name to the descriptions when they're added upon reservation creation.

- Fixed crash in auto-rates calculation when zero-dollar amounts are encountered for synchronized reservations.

<u>Changes since beta 3:</u>

- POS - Avoid blank inventory items from being added accidentally (e.g. if Add item is cancelled)

- Rates - Fixed the "Applies for a maximum of ___ periods" setting to apply to hourly rates also.

- POS - Remove the "Select Customer" button if the operator doesn't have access to add POS sales to a customer but does have access to add them to a reservation.

- POS - If a sale is being added to a reservation or customer, retrieve previous credit card information for payments

<u>Changes since beta 4:</u>

- Transfer Payment / Find Reservation - Don't insist on an exact match of the name if the name is changed.

- Deposit Applied -- When negative charges were added and the deposit had been fully applied, it wasn't un-applying the charges from the deposit.

- Auto-restore from a corrupted database -- This feature was added in 3.0 but was not being offered as an option in many cases.

<u>Changes since beta 5:</u>

- Fixed a bug from beta 2+ causing crashes when multiple workstations are used at the same time (particularly for Quote/Confirmation or other Transactions operations, or anything that might delete records).

- Improved refresh logic to reduce the number of unnecessary refreshes due to changes (record deletions, quote/confirmation, etc.) on other workstations.

- Avoid showing validation error messages in Online Reservations - Connections & Options until OK is clicked.

Changes since beta 6:

- Don't do any automatic rate recalculations after a reservation is checked out.

- Payments Due -- If including pending reservations with no payments made, only check the main reservation of a synchronized or sub-member set (since the others would not have deposits or payments anyway).