Campground Master Quick-Start Guide

This guide contains several short tutorials that will step you through common situations using the Campground Master software, using the included sample database. This is intended as a quick introduction to some of the basic functions.

You can browse this guide as an introduction to Campground Master, or you can work through the tutorials with the software running to actually perform the operations demonstrated. If working with the software, you can either have it open in a separate window while using the software or print topics from this guide (use the Print button on the toolbar), depending on which method you are more comfortable with.

Tutorials in this Quick-Start Guide:

Starting the Demo

All examples use the sample database, which is in the file "demo.prk". If you start the software using the "Campground Master Demo" icon on the desktop or the "Sample Database" icon in the Campground Master folder, this database will be loaded automatically.

If you don't see the Campground Master icon group window, follow this procedure to start the Sample Database:

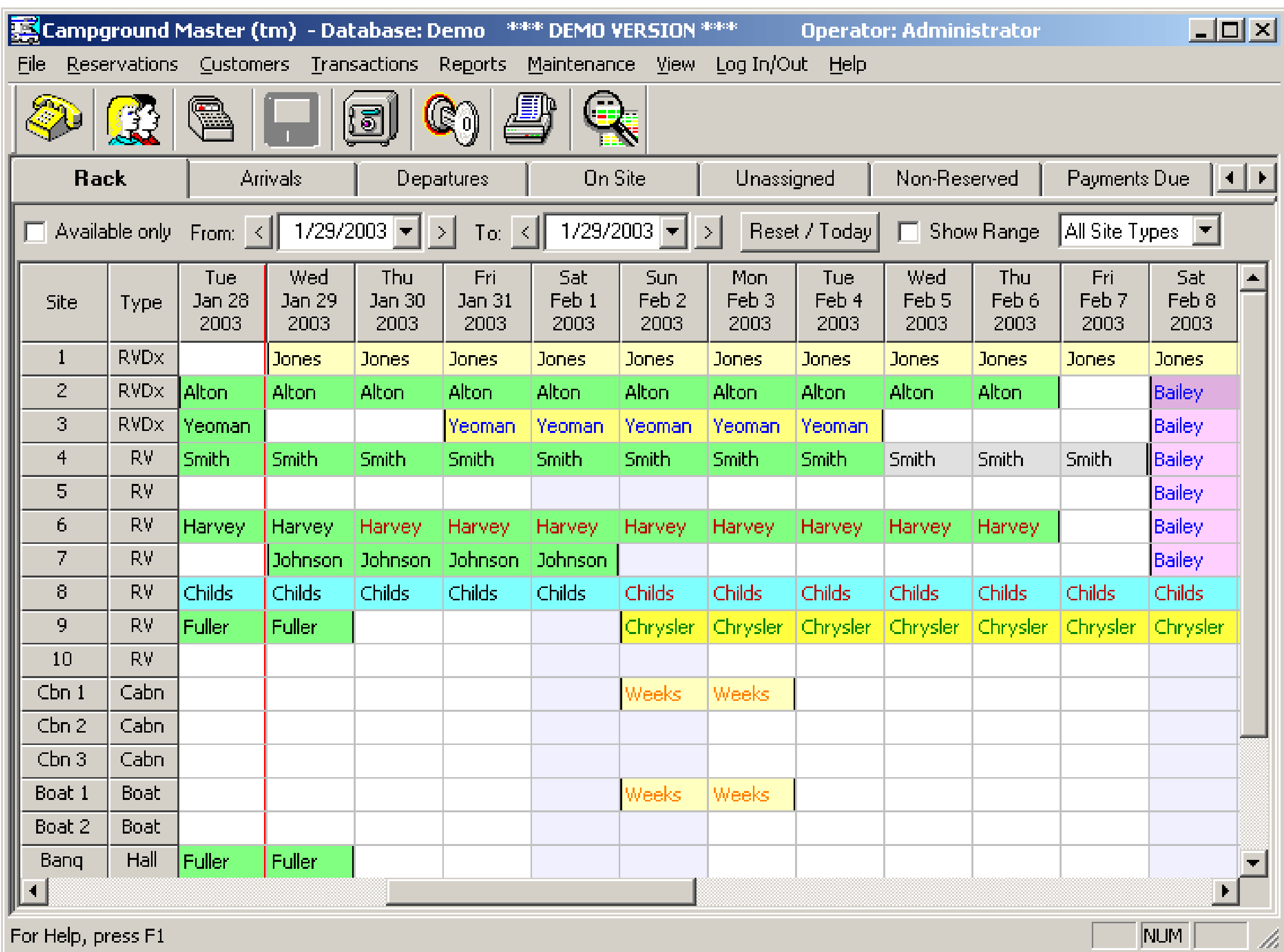
1) Click the "Start" button on the Windows task bar to open the Start menu.

2) Click on "Programs" to open the Programs menu.

3) Click on "Campground Master".

4) Click on "Sample Database".

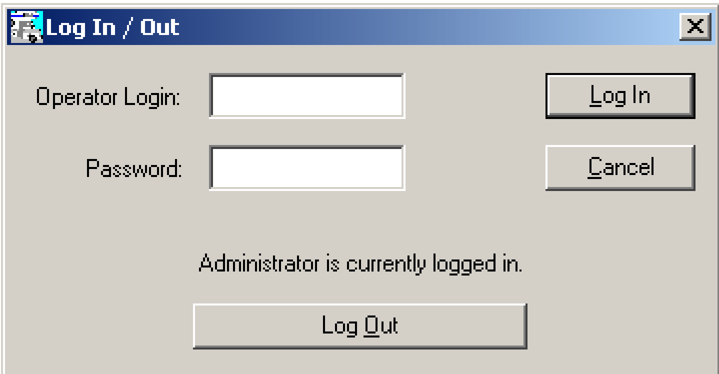
Now you should have the sample database opened, and should see a window similar to the on below. If you don't see several reservations on the grid as shown below, try re-adjusting the demo database dates with the menu function "Maintenance" / "Re-adjust all dates".



Logging In

In order to use Campground Master, you will need to be logged in. You should be automatically logged in upon starting the sample database. Click "OK" to continue and go to *Taking a Reservation*.

If you are not automatically logged in, you will need to log in manually. The Log In/Out dialog looks like this:



If you don't see the Log In/Out dialog box, click on "Log In/Out" in the main menu, or click the "key" button on the toolbar.

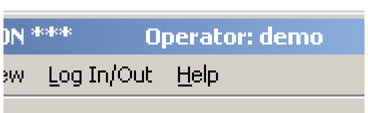
Once you see the Log In/Out dialog box, follow this procedure:

1) Type the word **demo** in the <u>Operator Login</u> field.

2) Press the **Tab** key

3) Type the word **demo** in the Password field. You will see "****" in the field instead of the word you typed.

4) Press the **Enter** key. You should now be logged in, and "Operator: demo" should appear in the caption.

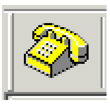


Taking a Reservation

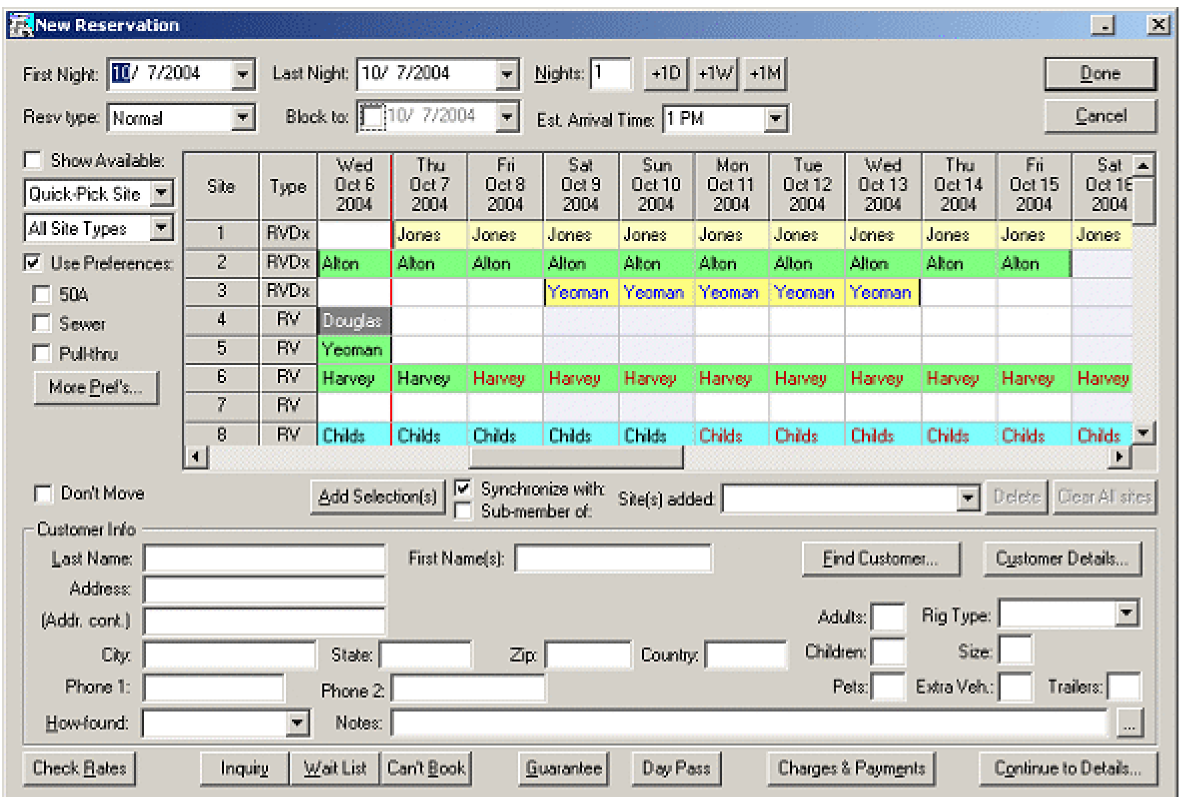
The simplest reservation must have a First Night, Last Night, and a customer's Last Name. Typically you would also assign a site to the reservation as well, but this can be done later if you prefer more flexible reservations.

Let's say that Mr. Able calls to say he will be arriving tomorrow, staying for 2 days, and would like a full-hookup RV site (with a sewer hookup). You know that Mr. Able has been here before and don't need any guarantee, so you just want to make sure a spot is saved for him.

1) Start by clicking the Telephone icon (the first one in the toolbar):



The New Reservation Entry dialog should appear:



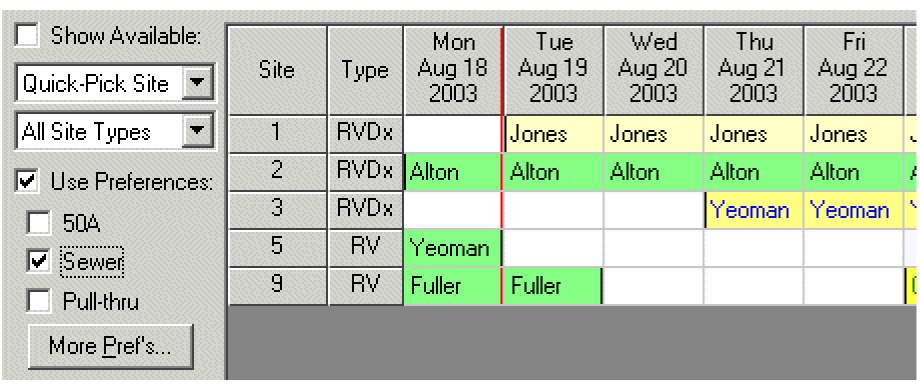
By the way, notice the red vertical line in the rack grid -- that's the divider line between yesterday and today. By default, the Rack view shows yesterday in the first column so you can see who might still be on site in the morning (and who hasn't checked out yet). This helps you avoid placing people in those sites until you're sure the current occupant has left.

2) Now select the first night to be tomorrow. That can be done by typing the date (tip: use the '/' key to jump to the days portion of the date), but you can also select the date by dropping down the calendar (click on the down-arrow button next to the date):

Now just click on tomorrow's date -- the 20th in this example. Note that today is circled in red on the calendar for reference.

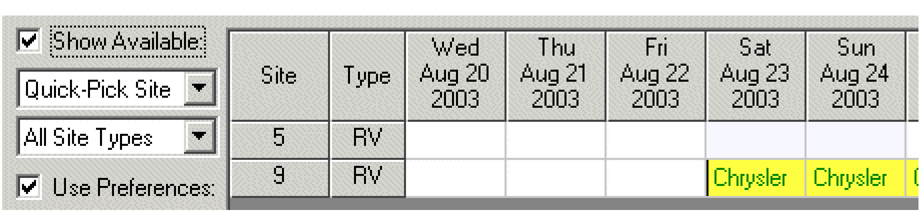
3) Since he's staying 2 days, the easiest way to enter that is to click the **+1D** button (next to the Nights field). You could also enter the number of nights or the Last Night directly, but the buttons are convenient if you're already holding the mouse.

4) To make sure you select a full-hookup site, you can check the Sewer box under Use Preferences. The sites shown will now be limited to the ones that have the selected attributes:



By the way, the preferences shown are very flexible -- up to 5 "quick-check" preferences of your choice can appear here, and many more can be accessed through the **More Prefs** button. Naming the preferences and configuring the sites accordingly is completely under your control.

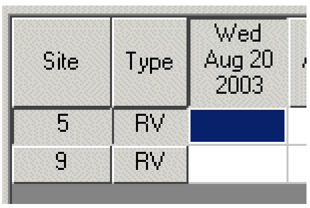
5) Lets also check the Show Available box so that we only see sites that are available for the days we selected:



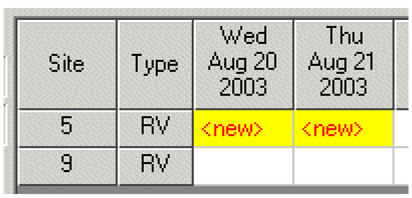
OK, now we're getting it narrowed down! Notice also that when Show Available is checked, the first date shown in the grid changes to the first night we selected.

6) Site 9 would work, but we know that Mr. Able tends to stay longer than he plans. So lets select site 5 since it's wide open.

There are 3 different ways to select a site to be used. You can use the Quick-Pick Site list, or you can click on the site in the grid and then click the **Add Selection(s)** button, or you can take the shortcut -- just double-click on the site in grid (on the white cell for the date you want). For instance, double-click on the cell shown in blue below (it's not blue for you yet, but it will turn blue momentarily when you click on it):

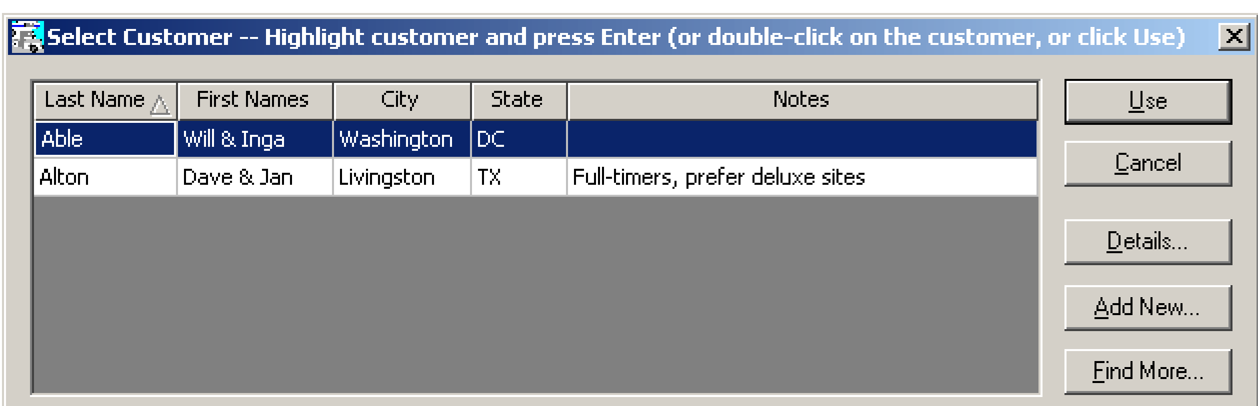


Once it's selected, you will see **<new>** appear in each cell for the reservation we're making:



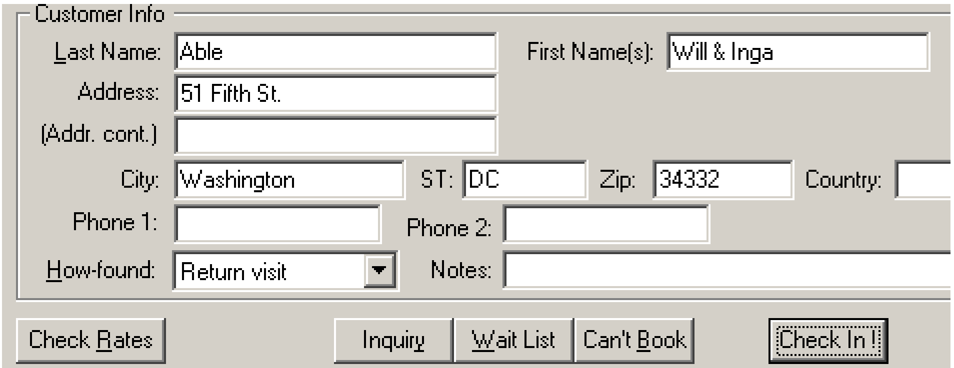
If you don't see this and just see the blue box as in the first image, it may be that the double-clicking didn't take. Look at the Site(s) Added field below the grid to make sure the site is there. If not, make sure the site is highlighted as above and click the **Add Selection(s)** button.

7) Now we just need to enter the customer information. Whenever you enter a customer's last name (or part of one) for a new reservation, Campground Master will check to see if it has anything matching that in the customer database. So, first click in the Last Name field (or you can press **Alt-L** to jump to it), then enter the letter **A** and press **Tab**. The Customer Selection dialog will appear, showing any matches (in this case, any that start with "A").



8) Now just double-click on the name **Able** (or, since this is the first name showing and it's already highlighted, you can just press **Enter** to use that one). The dialog should go away and Mr. Able's information should now be in the New Reservation Entry dialog.

The Customer Info portion of the dialog should now look like this:

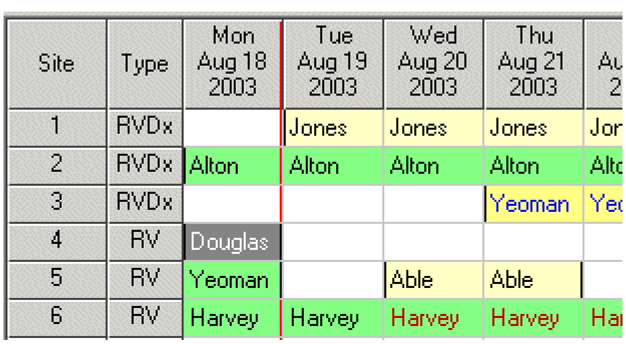


Note that How-found has been automatically set to "Return visit", since they were a previous customer.

If you would like to let them know the rate and total cost of their stay, you can click the **Check <u>R</u>ates** button (or press **Alt-R**). That will show a rates selection dialog, where you can select the appropriate rate(s) and have it calculate the total.

9) Now click the <u>Done</u> button in the upper right corner if the dialog to finish the reservation. (Note that if they were a walk-in customer and ready to check in, you could click the <u>Check In!</u> button instead to immediately check them in.)

Mr. Able should now appear as a pending reservation on the Rack, shown in a light yellow color, like this:



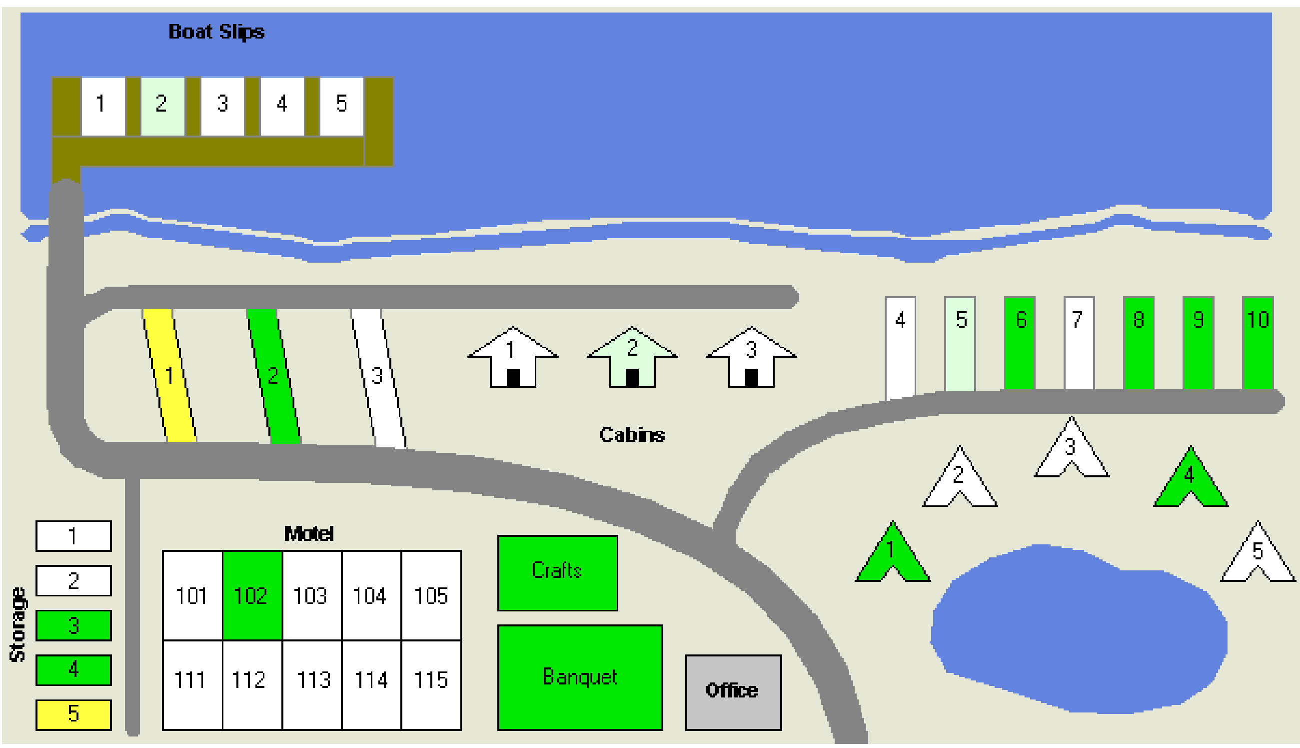
That's it! You have made a reservation!

Using the Map View

The Map view, if you have one, is used in much the same way as the Rack. You can use either view as needed, with mostly the same functions available on each. You will see a Map tab after the Rack tab. Click on that tab and you will see one of the maps in the sample database.

The map shown below is the "Filled" map, using the advanced fill-type status indicators for a more appealing map. To see this view, use the map-selector list:

Click either one of the forward/backward arrow buttons, or open the list to select a map directly. There is no limit to the number of map views you can have for your campground. Now the Filled map will be shown:



The site status colors are basically white (site available), green (site occupied now) and yellow (site reserved but not yet occupied). There is also a lighter green, as in Cabin #2 above, which means that the occupant is due out today but is not yet checked out. It's technically available for a new reservation today (assuming he really does leave today), so you can make a reservation on it if you want to.

As with the Rack, you can double-click on an available site to make a reservation, double-click on a reservation (occupied or reserved) to see the quick-info for that reservation, and right-click on a site for many other functions.

If you want to see what sites are available for a given date range, just enter the dates. Any sites that are open for the ***entire*** period will still be white, while any other color indicates that at least part of the range is not available.

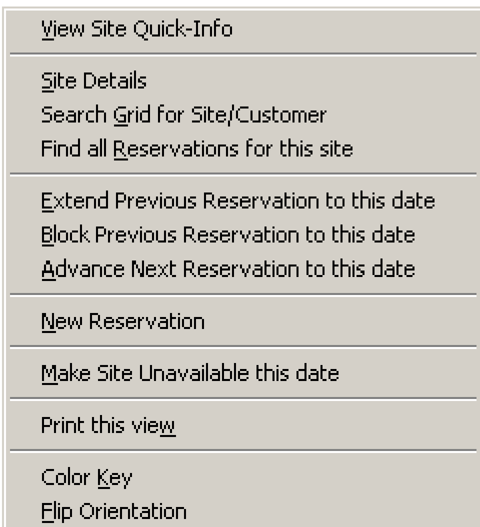
You can also narrow down the selection using the Site Types list as on the rack. Any sites not matching the selected type will be "blacked out", making it easy to see the appropriate sites.

As with any other view, if you don't know what a color means (or if you want to change it) just right-click on the view and open the Color Key.

Changing a Reservation Start Date

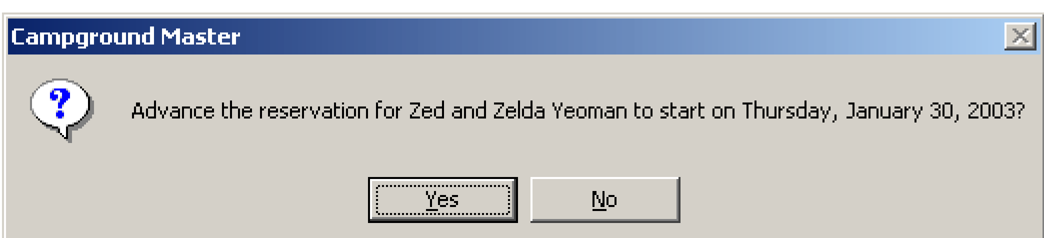
Let's say Mr. Yeoman called and said he's going to arrive a day early. Now you need to change the start date for his reservation. This is easily done with a couple clicks on the Rack.

1) Right-click on the cell one day ahead (to the left) of Yeoman's reservation on site 3. This menu should appear:

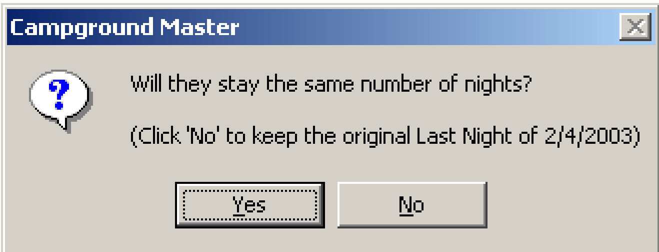


Click on the option <u>Advance Next Reservation to this date</u> (or you can press the letter **A** as a shortcut).

A prompt will appear to confirm the change, something like this:



2) Click on Yes (or press the **Enter** key) to confirm. Now you will have a choice of whether to keep the number of days the same, or leave the last night the same:



3) Just click your choice, depending on what they want to do. (If you're not sure, click No so the reservation doesn't end earlier than they expect, and you can change it when they check in.)

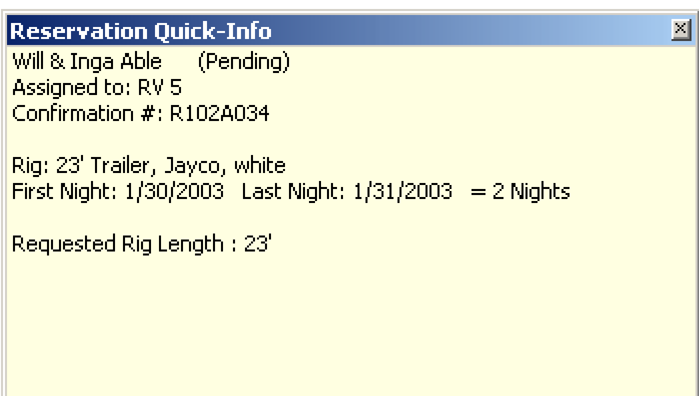
That's it, the Rack will update with the change automatically.

Viewing Reservation Quick-Info

There is a simple way to see most of the information about any reservation:

Just double-click on the reservation in the Rack or other tab view (for instance on "Able", the name of the customer you just made a reservation for).

The Quick-Info window should appear:



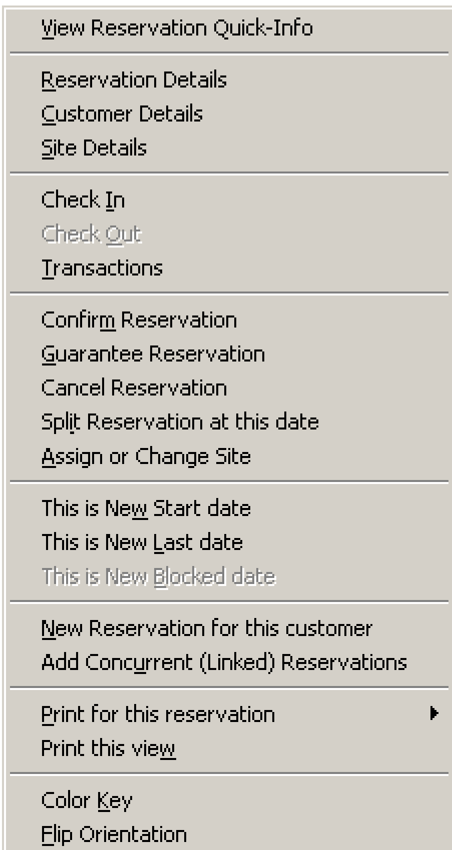
You can see the name, reservation status, site, first & last nights, rig type, and requests (automatically carried over from the existing customer information). If you made any notes with the reservation, they would also show up here.

To clear the Quick-Info window, just click anywhere outside the window or press the **ESC** key.

Checking In and Adding Charges

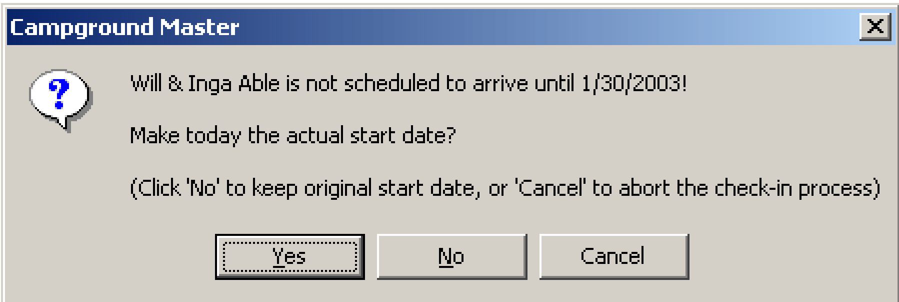
Let's say Mr. Able decided to get an early start and arrived at your campground today instead of tomorrow. Now you need to change the start date for his reservation and check him in. You could use the previous procedure to change the start date first, or you can just check him in. Since Campground Master knows that you don't normally check people in until they're here, you can save a step.

1) Right-click on Able's reservation on the Rack (it doesn't matter which part of the reservation for this operation). This menu will appear:



2) Click on <u>Check In</u>. This prompt will appear:

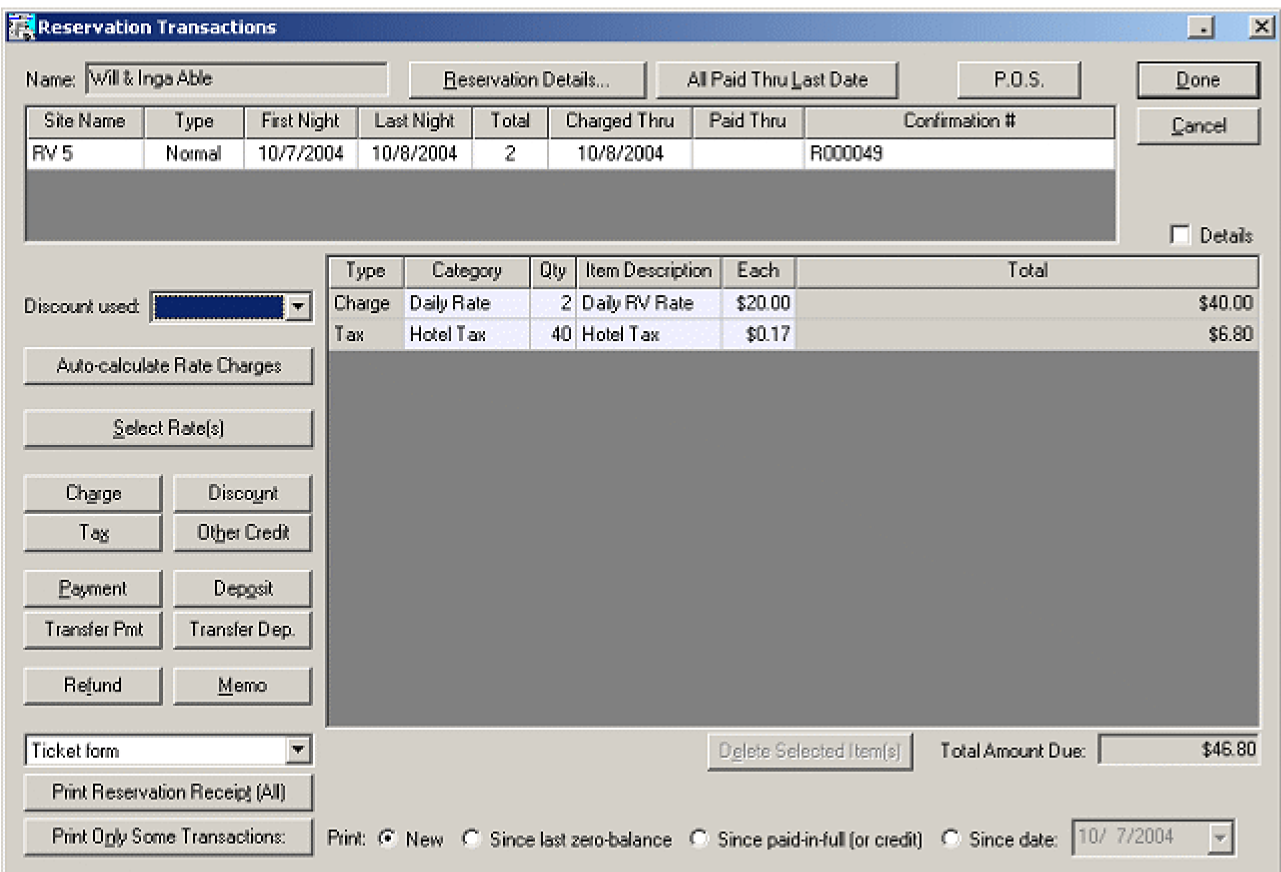
3) Click Yes (or press the **Enter** key). Since they're not scheduled to arrive today, you'll see an extra prompt that you wouldn't normally see:



4) Click Yes (or **Enter**), and you'll be asked if they're staying the same number of days, as in the previous example.

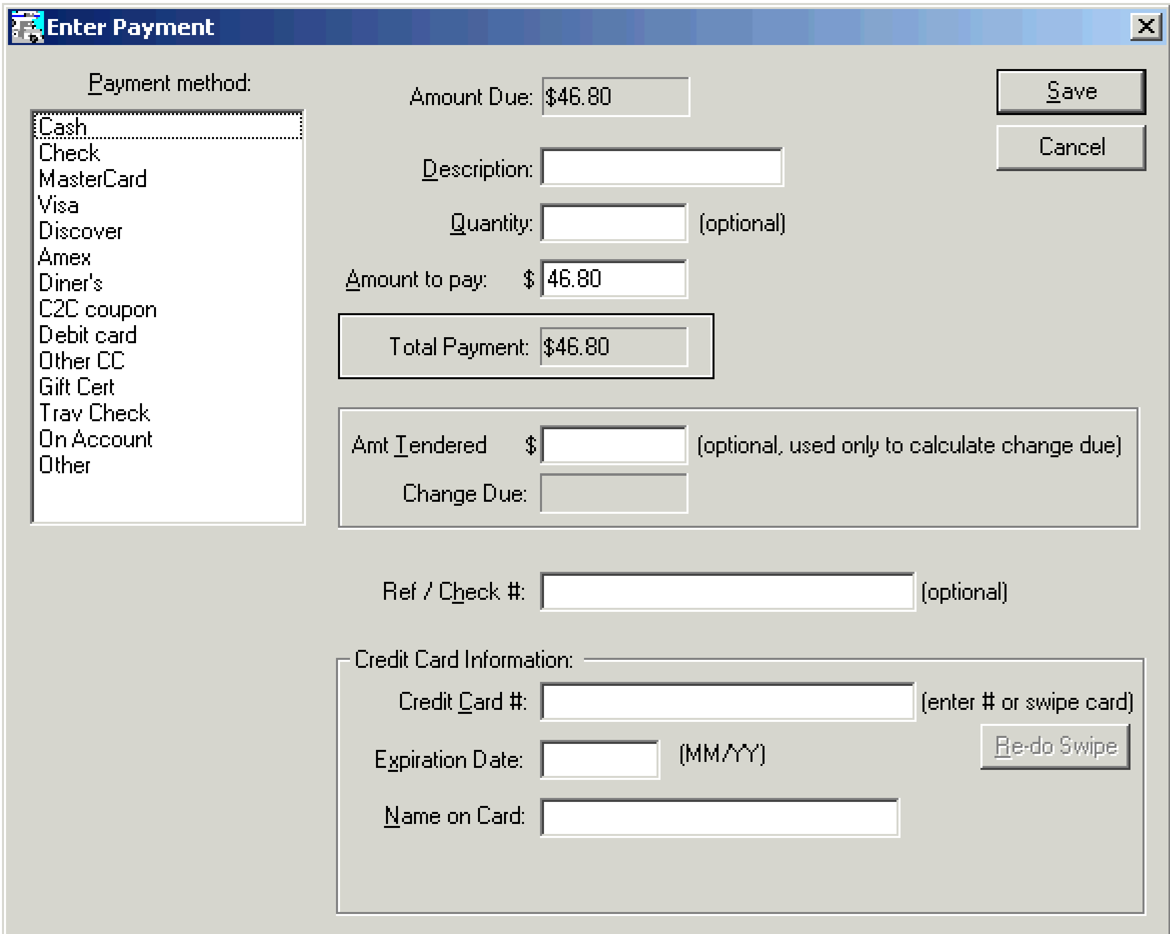
5) Click Yes (or **Enter**) to have them stay the same number of days.

Now you will be taken to the Transactions dialog:



Because we have Auto-Rates enabled and set to automatically add charges on Check-In, Campground Master has figured out the appropriate rate for this site and the length of stay and added the appropriate charges. They appear in blue to indicate that they are auto-charges.

6) Now assuming he's ready to pay the bill, we just need to enter the payment. Click the Payment button, and a Payment Entry dialog will appear:

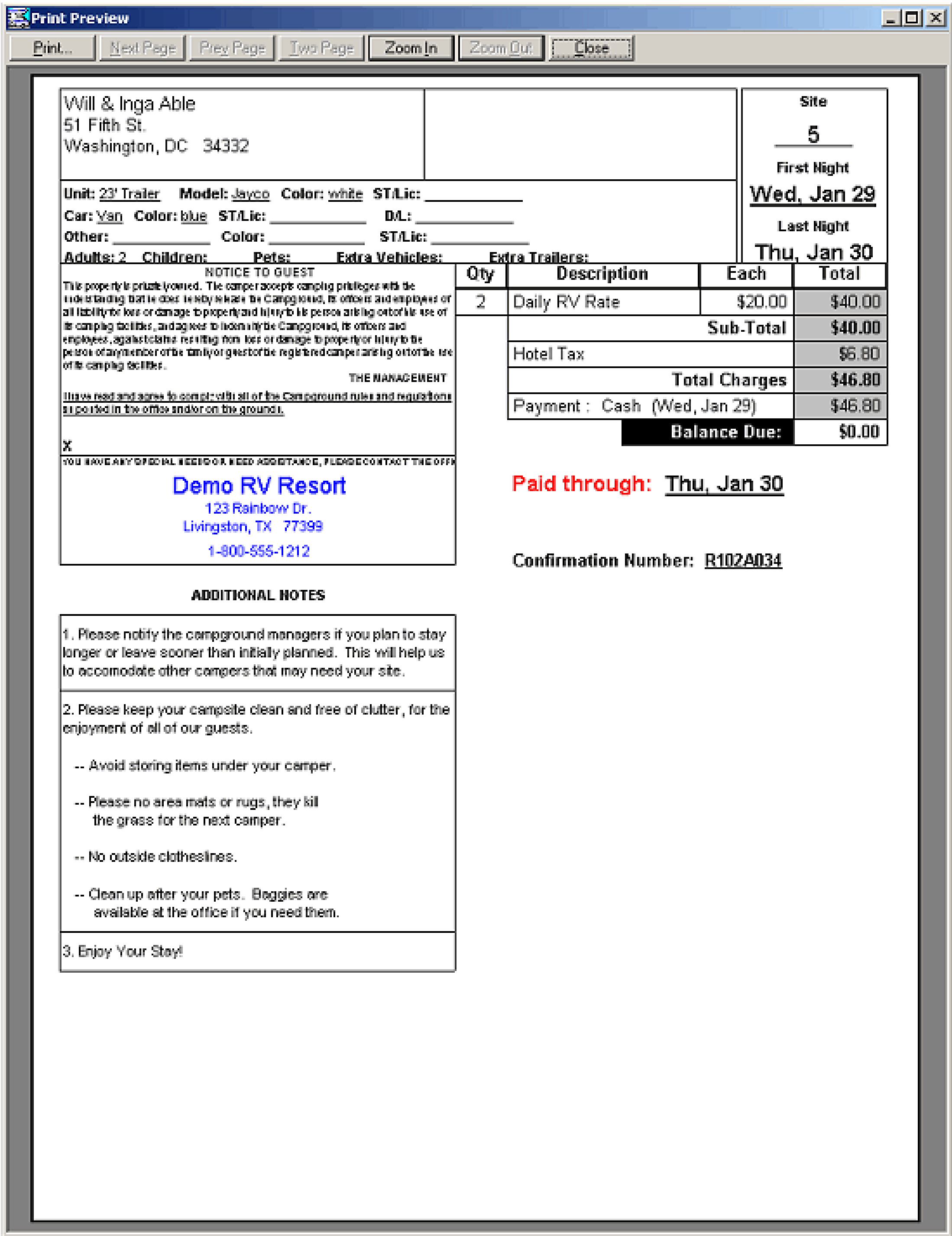


7) Notice that the amount is already filled in. They're going to pay the full amount in cash, so all you have to do is click Cash to select the payment type, and click OK. (If they were paying by another method, you could enter credit card details, check #, or other reference information if you like.)

The payment will be added to the transaction list:

Type	Category	Qty	Item Description	Each	Total
Charge	Daily Rate	2	Daily RV Rate	$20.00	$40.00
Tax	Hotel Tax	40	Hotel Tax	$0.17	$6.80
Payment	Payment		Cash	$46.80	$46.80

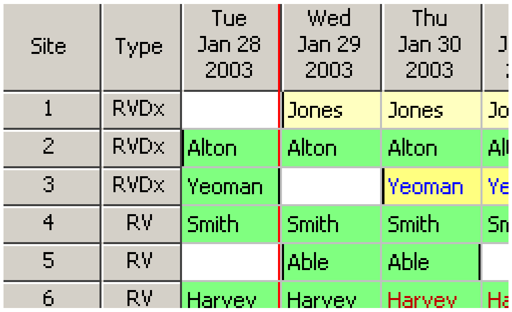
8) They probably want a receipt, so you need to print one. Click the Print Reservation Receipt button, and a preview will appear:



If you have a printer connected, you can go ahead and click the Print button, and then you'll see Windows' normal Print dialog. Click OK to print it out. Otherwise, just click Close on the preview window to cancel the printing.

You'll notice that the Paid Through date has been automatically set (since it now has a zero balance after a payment, the program automatically knows this).

9) Now back at the Transactions dialog, click Done to finish up. Mr. Able's reservation will now be shown in green to indicate that he's checked in:



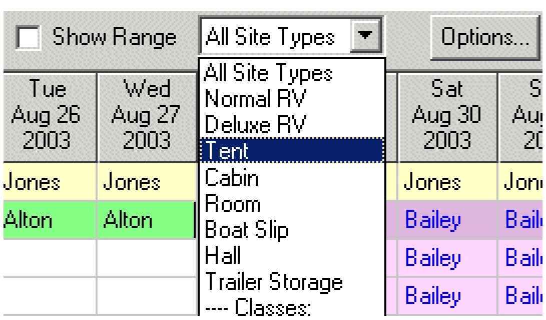
That's it, he's checked in and paid in full.

Starting Walk-in Reservations from the Rack

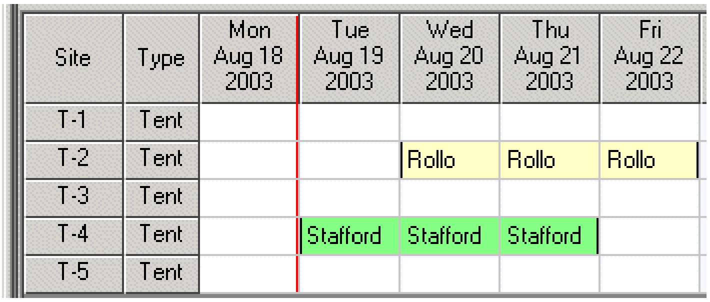
Earlier in *Taking a Reservation*, we started a reservation with the telephone icon. That's just one of several ways to start a reservation. You can also start by locating a suitable site on the Rack view first, so you have a much larger overview to work with. You can also narrow site selection down by sites available and by type, just like on the New Reservation dialog (only the Preferences selections aren't available on the Rack). While either way works well for walk-in reservations, we'll start with the Rack for this example.

OK, so lets say we need a Tent site for 3 days.

1) If your park has more than a few sites, the tent sites may not be immediately visible on the Rack. They may not even be all listed one after another, depending on how you've arranged the sites. So first limit the visible sites to tent sites by selecting **Tents** from the site types list:

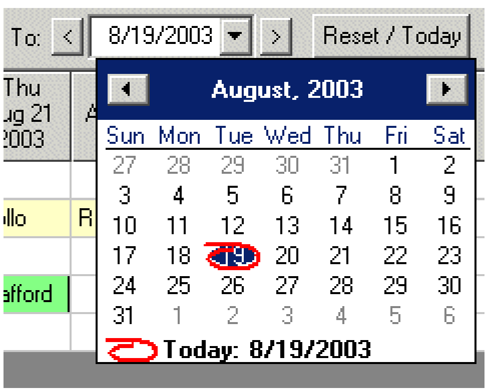


Now only the tents are listed:



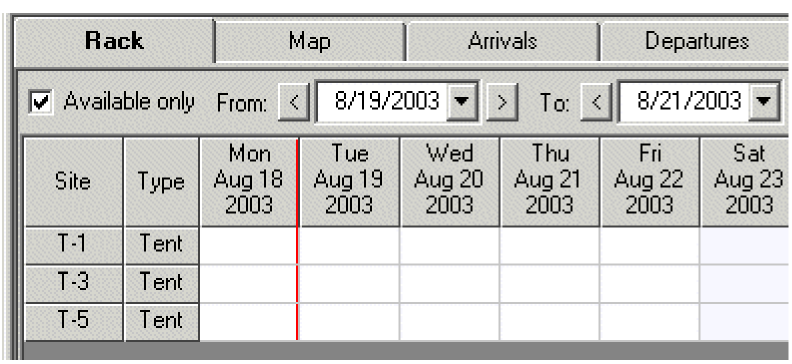
2) It's pretty obvious here which sites are available for 3 days, but for the sake of example lets assume there were many tent sites and most are occupied. We can further limit the selections by entering the dates and selecting Available only.

First select the To date by clicking on the down-arrow button next to the date. A calendar will appear, so you can select the date without typing.



3) Remember that the "To" dates for reservations are based on the "Last Night". So for 3 nights, click on the appropriate date (in this case, the 21st). The calendar will close and the new "To" date will be shown.

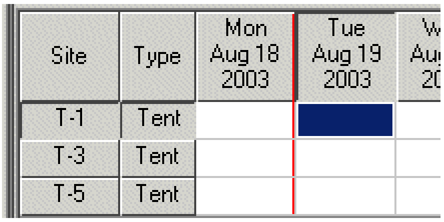
4) Now check Available Only to remove any sites that can't accommodate the requested dates.



5) OK, now you can see exactly what's available. Just double-click on today's cell for site T-1 (this is

highlighted in blue below, but it won't be highlighted on your screen).

Remember that the red line is the "today" mark, so today is always the column to the right of it.



If you have difficulty double-clicking, you can right-click on it and select "New Reservation" to do the same thing.

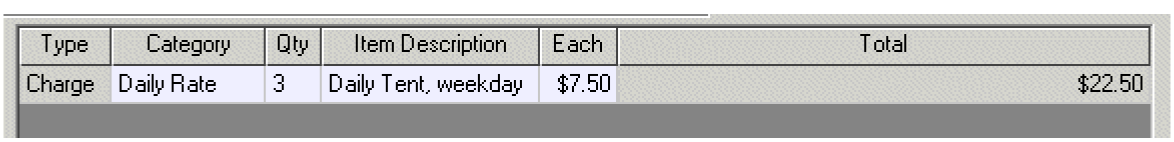
Either way, the New Reservation dialog will be displayed. Since we already selected the site and dates on the rack, those are already filled in for us.

6) Now we need to enter the customer information. Lets say this customer is not yet in our database. Go ahead and enter a name in the Last Name field (lets use "Thomas") and press Enter. There are no "Thomas"es in our database yet, so you will see the message "No matching customers were found". If there had been others they would be listed. Since this is a new customer, we can now just press the **Enter** key to select the default action, which is **Add New**.

7) The Customer Details dialog will be displayed, where you can enter as much information as you like for this customer. When that's done, Click **Save** to save that customer in the database. You will then be taken back to the New Reservation dialog, and the customer information you entered will be shown.

8) The How-found field will be highlighted, so you can select an appropriate item if you like.

9) OK, we're almost done.... click the **Check In** button to check him in, since he's here now. After a confirmation prompt, the Transactions dialog will be shown. Since auto-rates are enabled, the charges are already added:



(The charges you see may differ if weekend days are included in the reservation dates.)

Now just enter the payment and print a receipt, as covered earlier in *Checking In and Adding Charges*.

10) After that's all done, you'll want to get the Rack back to normal. To do that, click the "Reset/Today" button:

Now the full Rack is back and you're ready for the next one!

Guarantees and Advance Deposits

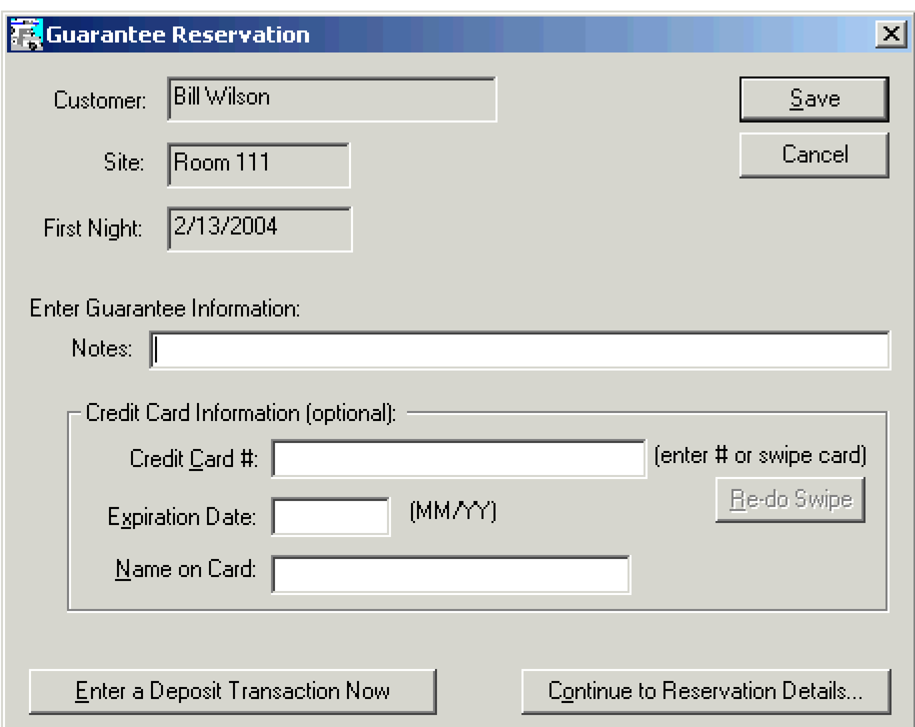
You may want to record credit card information or charge advance deposits for reservations, in case they don't show up or don't call to cancel early enough.

In Campground Master, the "Guaranteed" status is generally used to indicate that a reservation has either guarantee information or a deposit.

To make a guarantee without a deposit:

1) Start by making a reservation using one of the methods previously covered, but click the **Guarantee** button after the reservation information is entered on the New Reservation dialog.

2) The reservation will be saved, and the Guarantee Reservation dialog will appear. You can enter the credit card and/or any notes you like.



3) Click **Save**, and the reservation will be guaranteed.

If you also wanted to enter a deposit, you can click the **Enter a Deposit** button instead of Save. But if you wanted to do that there's actually a shorter way (see below).

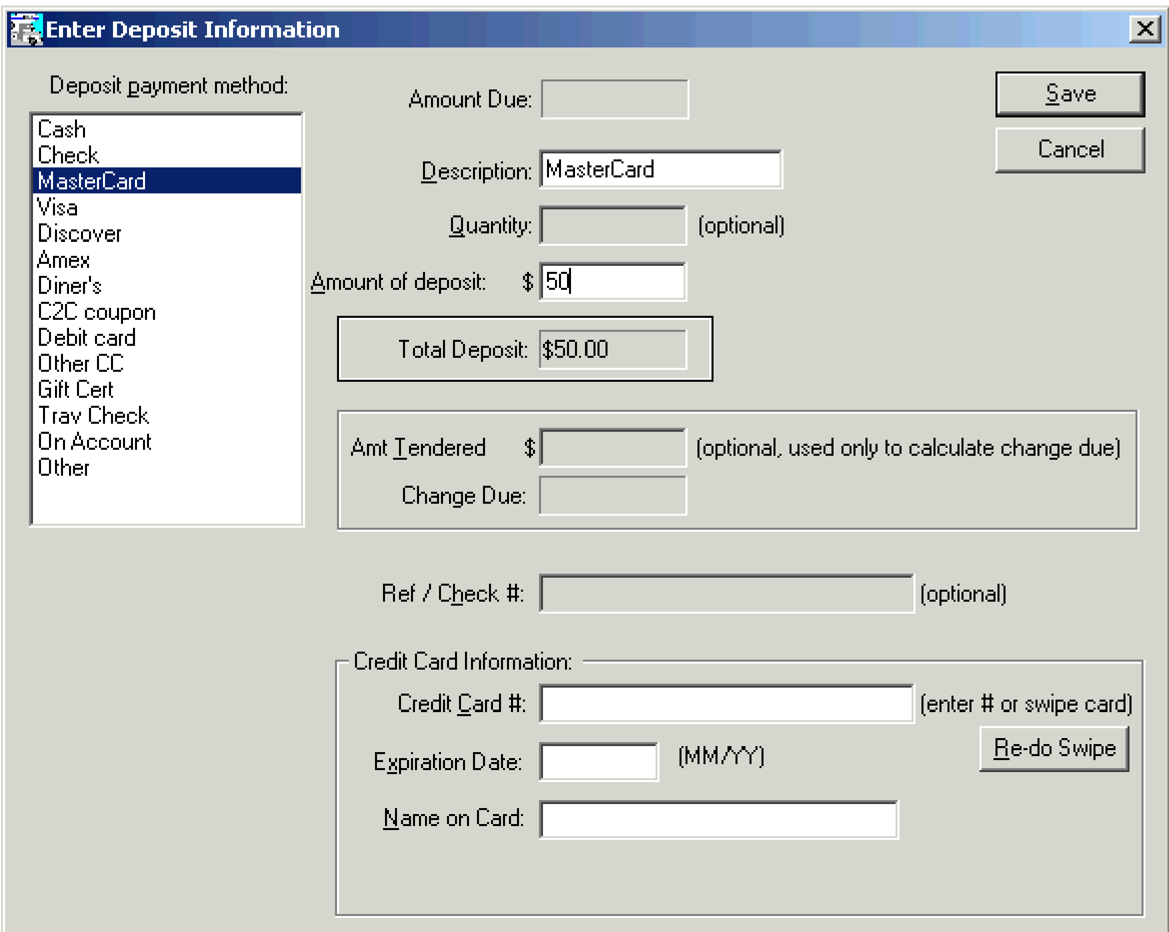
Note that the Guarantee function is also available directly from the right-click menu on the Rack, and also from Reservation Details.

To enter a deposit and guarantee it at the same time:

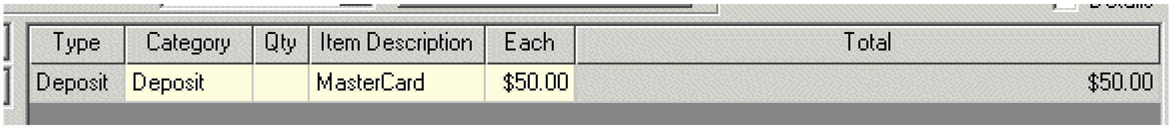
Whenever you make a deposit transaction, the reservation will be guaranteed automatically (unless this is disabled in the program options). So for deposits you can skip a couple of the steps above.

1) Make a reservation as before, but after the details are entered click the **Charges & Payments** button on the New Reservation dialog. This will save the reservation and open the Transactions dialog directly.

2) Click the **Deposit** button. A Deposit entry dialog will appear (identical to the Payment entry dialog).



3) Select a <u>payment method</u>, enter the <u>Amount of deposit</u> and a <u>Ref / Check #</u> (or Credit Card Information) if needed. Click **Save**. The deposit will appear as a transaction:



Type	Category	Qty	Item Description	Each	Total
Deposit	Deposit		MasterCard	$50.00	$50.00

4) Click **Done**. The reservation is guaranteed automatically.

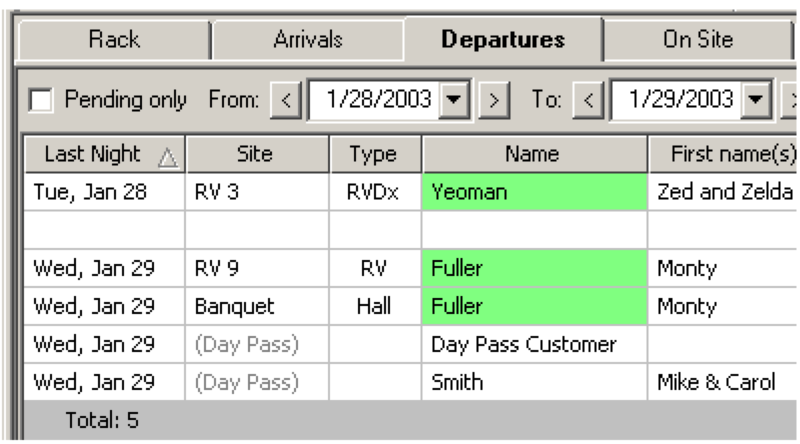
Checking Out

Checking out is generally much easier than checking in, because they're probably already paid in full. Campgrounds don't usually require customers to stop at the office to check out, but you still want to update the reservations' status to mark them as checked out (this helps in reporting and also as a visual indicator that they're already gone).

You can check them out any time you know they've left -- if they let you know they're leaving, or if you see them leave, for instance. This can be done easily with the right-click function on the Rack.

However, toward the end of the day you will want to review the reservations due out today to make sure you have checked out everyone who actually left.

1) Click the Departures tab to view the departures report:



Last Night	Site	Type	Name	First name(s)
Tue, Jan 28	RV 3	RVDx	Yeoman	Zed and Zelda
Wed, Jan 29	RV 9	RV	Fuller	Monty
Wed, Jan 29	Banquet	Hall	Fuller	Monty
Wed, Jan 29	(Day Pass)		Day Pass Customer	
Wed, Jan 29	(Day Pass)		Smith	Mike & Carol
Total: 5				

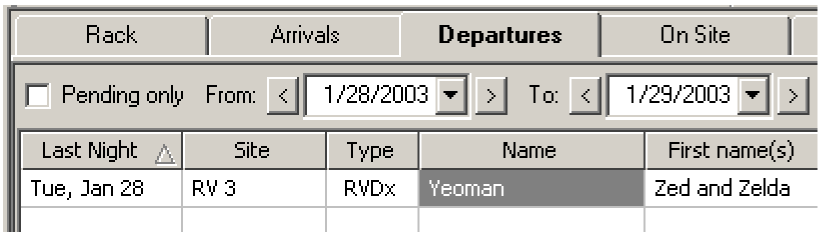
Notice that it shows two days by default -- yesterday and today. The reservations are sorted by date (and by site if there is more than one on the same day), with a gap between the days. This makes it easy to see who should be gone today, and also who's going to be leaving in the morning.

You can see here that Yeoman's last night was yesterday, so he should be gone today. After checking their site you see that they are, so you want to check them out.

2) Right-click on their name, and select Check Out from the menu. (You know what the menus look like already.)

3) A simple Yes/No confirmation prompt will appear -- click Yes.

That's it, they are now checked out. Their status color will change to indicate "checked out":



Tips:

Check the Pending only box on the Departures tab to exclude anyone already checked out. This can shorten the list on busy days, and will help you spot people that should have left but haven't been checked out yet.

Pay attention to the Last Night shown. If it shows only today's date, that actually means that there are no departures remaining for today (remember that these are actually tomorrow's departures, since tonight is their last night).

Extending a Stay

Let's say Mr. Able really likes your campground and has decided to stay 2 extra days, so we need to extend his reservation.

1) Starting from the Rack view, right-click on his new expected leaving date (2 cells past his current ending date).

2) Click "Extend Previous Reservation to this date" in the menu.

3) Answer Yes to the confirmation prompt.

4) Since they're already checked in, the Transaction dialog will appear so you can add the extra charges. Since the dates have changed, you will not want to click the **Auto-calculate Rate Charges** button to have it add the additional charges. Then follow the same steps as in the *Check In tutorial* to add the additional payment and print a new receipt. If you wish, you can use Print New Transactions Only for the receipt so that the earlier transactions aren't duplicated. Click Done, and the changes are finished.

Shortening a Checked-In Stay

If a reservation is not yet checked in, and presumably does not have charges applied yet, then shortening the stay is as simple as changing the Last Night. This can be done on the Reservation Details, or directly on the Rack by right-clicking on the preferred last date and selecting "This is the new last date" from the context menu.

If the reservation is already checked in and they decide to leave early, then it takes a few more steps -- assuming that you allow refunds of the unused days.

So, lets say Alton has to leave 2 days sooner than planned. Since he's giving plenty of notice, you decide to refund the 2 days.

1) Right-click on Alton's reservation on the Rack (on site 2), and select Reservation Details.

2) Change the Last Night so it's 2 days less than before.

3) Click New / Edit Transactions to get to the Transactions dialog.

On the Transactions dialog you'll see that it's already paid in full, with the transactions in blue indicating that they were auto-calculated.

4) Click the **Auto-calculate Rate Charges** button. New transactions will be added with negative quantities, essentially reversing the charges for 2 days. The reversed charges include the Escapees discount and Hotel Tax. He now has a credit (negative) balance in Total Amount Due.

5) Click the **Refund** button and select the refund payment method (Cash in this case, since he paid in cash originally). The amount is already filled in, assuming you give a total refund, so click **Save**.

The transactions should look like this now, with yellow indicating the transactions not yet committed (saved):

Type	Category	Qty	Item Description	Each	Total
Charge	Weekly Rate	1	Weekly Deluxe RV Rate	$150.00	$150.00
Charge	Daily Rate	3	Daily Deluxe RV Rate	$25.00	$75.00
Discount	Discount	3	Escapees	$3.75	$11.25
Tax	Hotel Tax	213.75	Hotel Tax	$0.17	$36.34
Payment	Payment		Cash	$250.09	$250.09
Charge	Daily Rate	-2	Daily Deluxe RV Rate	$25.00	$-50.00
Discount	Discount	-2	Escapees	$3.75	$-7.50
Tax	Hotel Tax	-42.5	Hotel Tax	$0.17	$-7.23
Refund	Refund		Cash	$49.73	$49.73

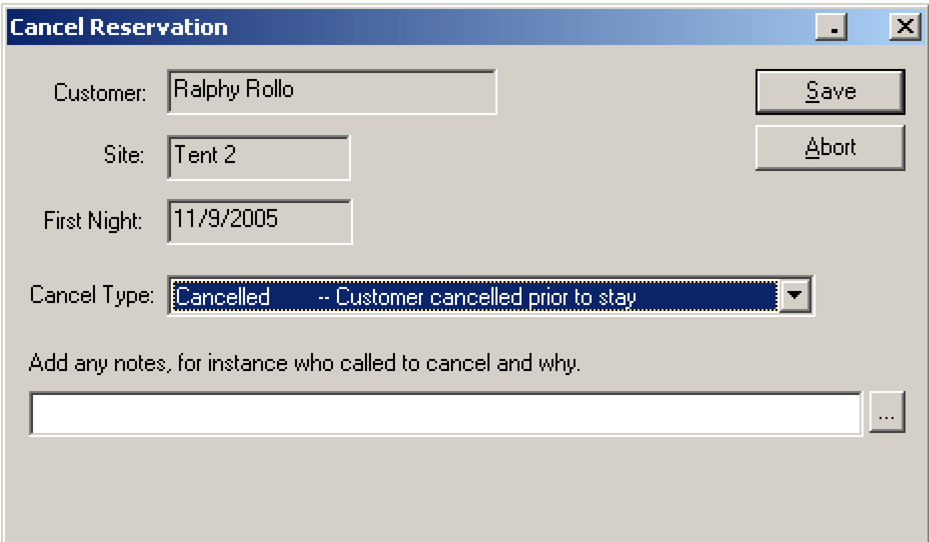
6) Print a new receipt if needed, then click **Done** to save the new transactions (taking you back to Reservation Details), and click **Done** again to save the date change.

Cancelling a Reservation

Cancelling a reservation is typically very easy.

Lets say that Rollo, in tent site T-2, calls to cancel his reservation.

1) Locate the reservation on the Rack (or other tab view), right-click on it, and select Cancel Reservation. A dialog will appear where you can add notes to the reservation with the reason for cancellation, etc.



2) Select the type of cancellations from the drop-down list. The possible types are "Cancelled", "No-Show", "No-Stay", "Mistake", and "Other". To leave it as "Cancelled", just press the **Tab** key to skip to the notes.

3) Enter a note if you like, such as "Couldn't find his tent", and click **Save**.

4) The Transaction dialog will appear. This is done so that you could add a cancellation charge, refund deposits or reverse other charges if needed. If you decide not to charge for the cancellation and nothing needs adjusted, just click **Done**. Otherwise make the necessary adjustments first.

5) Now the reservation will be removed from the rack and considered "non-reserved". However the reservation is still in the system if you need to refer to it. You can access it through the customer's Reservation History, or through Find Reservation. You can also see it on the Non-Reserved tab view.

6) Click on **Non-Reserved** tab. By default it shows Waiting List reservations (since they have the most potential to become "real" reservations).

7) To see the Cancelled reservations for a given date range (which defaults to 1 month from today), change the Waiting List selection to Cancelled.

(All Not Reserved would also work, since that shows all types.)

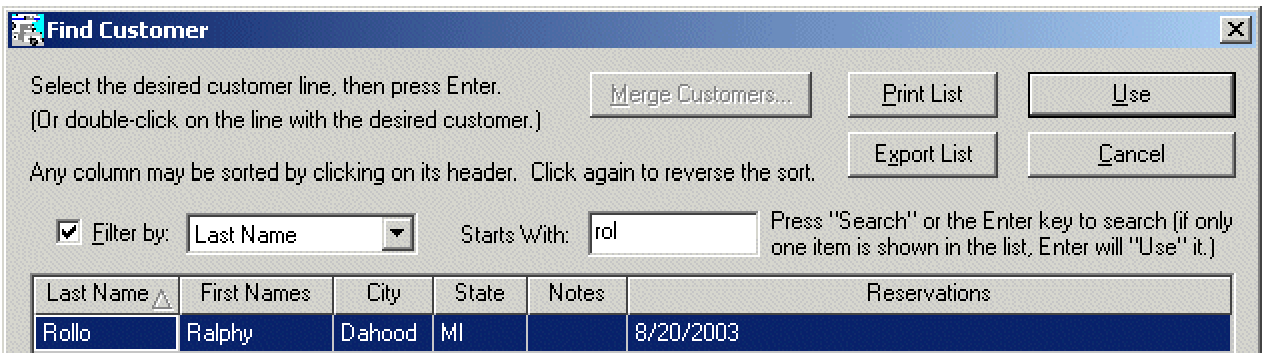
Now you'll see the one we just cancelled, as well as any other cancelled reservations that would have occurred within the selected dates.

Black-listing a Customer

Lets say that you don't believe the excuse Rollo gave you for cancelling his reservation, and would prefer to not allow him to make another reservation. You can add him to the "Warning" list.

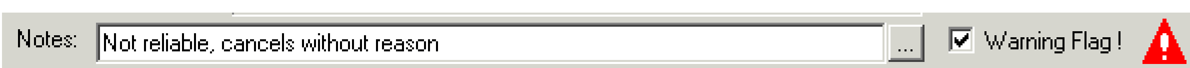
1) First you need to find him. Since he's no longer on the Rack, lets try finding him with Find Customers. You can get to this from the Customers menu, but there's a shortcut too -- press **Ctrl-U** on the keyboard.

2) The Find Customer dialog will appear. Unless the last search was different, it will be ready to search by Last Name. Just enter part of the last name in the Starts With field -- "rol" will be good enough. It doesn't matter whether it's upper or lower case. Then press the **Enter** key. Rollo will be shown:



3) The first entry is always selected after a search, so all you have to do is press **Enter** again to open that customer's details. (If he wasn't the first entry, you could use the arrow keys to move to the right one before pressing **Enter** -- or just double-click on it with the mouse).

4) Customer Details will be shown for Rollo. We want to set his Warning Flag, and also enter the reason in the Notes. You'll see that when you check the Warning Flag box, a bright red icon shows up. This will be shown on the New Reservation dialog if this customer is selected for a reservation, so it's hard to miss!



You may be wondering why the notes we made when the reservation was cancelled don't show up here. That's because Reservation Notes stay with the reservation, separate from the Customer Notes. Otherwise you would end up with lots and lots of notes on the customer's record, which would likely be obsolete once the reservation is past.

5) If you ever want a list of all black-listed customers, you can get it through the Customers menu: Customers with Warning Flags.

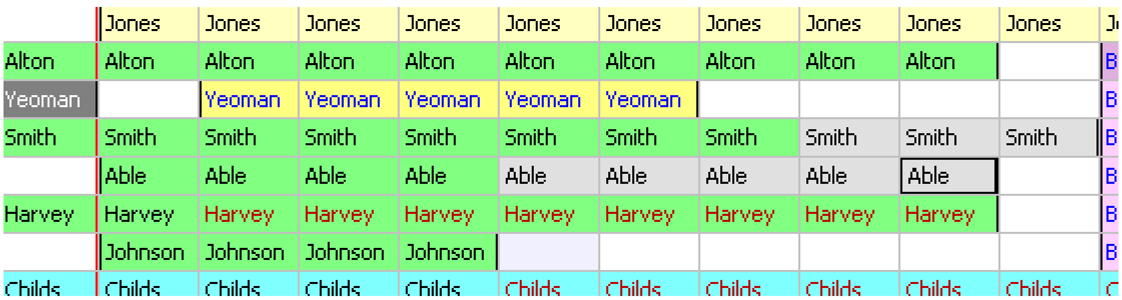
Blocking Extra Days

Mr. Able says that he may even stay another 5 days but he's not sure (meaning that he doesn't want to pay the extra days until he's sure he will stay). Since you don't have a new reservation for that site for at least 5 days later, you agree to save the site for him for 5 extra days until he decides.

1) On the Rack view, right-click on the cell 5 days after the end of his reservation.

2) Click Block Previous Reservation to this date in the menu.

3) Click Yes in the confirmation prompt that appears. The Rack will immediately be updated, showing the blocked dates in gray:



If he does decide to stay the extra days, you will just repeat the *Extending a Stay* procedure. If not, you can clear the block (right-click on the last blocked date), or just check him out when he leaves and the blocked dates will be cleared automatically.

Moving Reservations

It's quite common to move reservations around to different sites, so we made this as easy as possible. You can do this whether they're current or future reservations. (However, moving a person that has already checked in on a previous day requires "Splitting" the reservation into two parts. Refer to the manual for information on Splitting Reservations.)

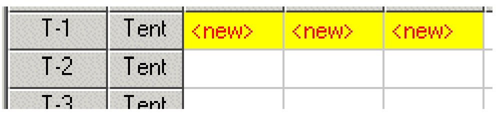
Lets say that Stafford, on T-4, complains that his site was too muddy and wants to move to T-1. He's already checked in but just arrived today, so we don't have to split him. (Note that this assumes you're using the Sample Database on the first day -- if not, you can use the "Re-adjust all dates" function under the Maintenance menu to reset everything to today.)

1) Locate Stafford on the Rack (or any other view, like Arrivals). Right-click on the reservation, and choose Assign or change site. You can also do this from Reservation Details if necessary.

The Change Site Assignment dialog will appear -- actually this is the same as the New Reservation dialog! You use it the same way.

2) A good way to start is to check the Show Available box so we know what's available. Also, we know he still needs a Tent site, so drop down the "All Site Types" list and select Tent.

3) Now we see that T-1 is open. Double-click on an open cell for T-1, and you'll see the **<new>** indication just like it's a new reservation.



Of course we could have also used the Quick-Pick Site list -- but double-clicking on the grid is easier for most people.

4) Click **Done**, and he'll be moved.

Swapping Reservations:

There are no good candidates for swapping in the Sample Database the way it starts out, so we'll briefly describe how to swap two reservations.

1) Locate one of the reservations to be swapped and select Assign or Change Site as before to open the Change Site Assignment dialog.

2) Locate the reservation you want to swap it with on the grid in the dialog. (**Tip:** You can use the **F9** / **Alt-S** shortcuts to access the Search function, just like on the Rack.) However, ***don't*** check Show Available, since that would exclude all occupied sites -- including the one you want to swap with! (If Show Available is checked by default, you may need to uncheck it.)

3) Right-click on the reservation to swap, and select Swap sites with this reservation. A confirmation prompt will appear -- make sure it's right, and then click Yes. That's it, they're swapped.

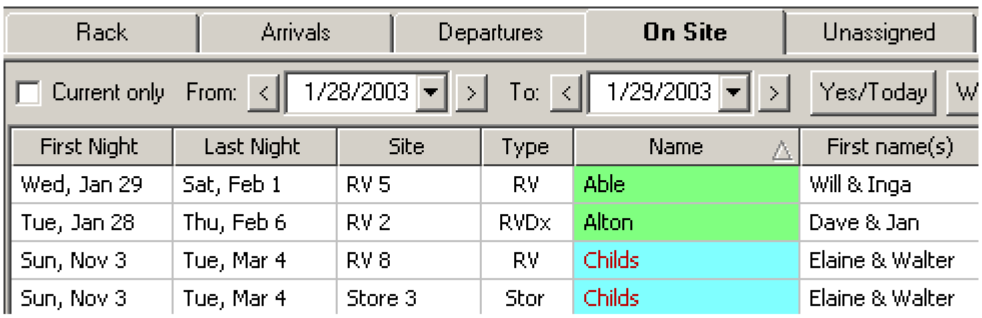
Note that it will show an error if the swap would result in a reservation conflict (due to different lengths of stay), so it's not possible to cause a reservation conflict.

Changing Customer Information

Mrs. Able noticed that you don't have their phone number (since it was blank on their receipt), and would like you to have it on file in case of an emergency.

There are a lot of ways to get to the Customer Details entry (just right-click on their reservation on the Rack, for instance.) But let's pretend that you have 200 sites so they're not so easy to find on the Rack, and she can't remember their site number at the moment. We can find them easily with the On Site report.

1) Click on the **On Site** tab to see the list of currently staying customers, and then click on the Last Name column header to sort by last name:

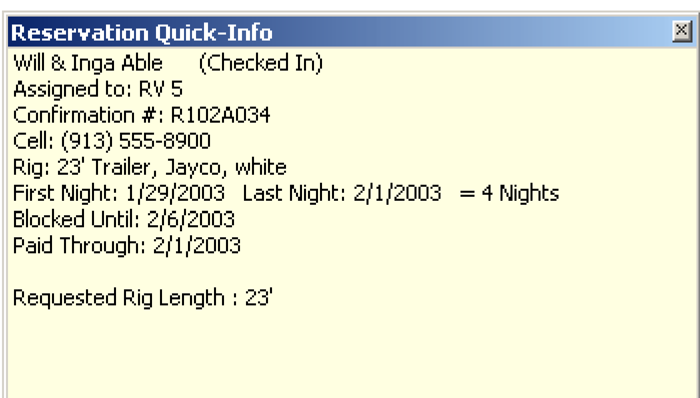


First Night	Last Night	Site	Type	Name	First name(s)
Wed, Jan 29	Sat, Feb 1	RV 5	RV	Able	Will & Inga
Tue, Jan 28	Thu, Feb 6	RV 2	RVDx	Alton	Dave & Jan
Sun, Nov 3	Tue, Mar 4	RV 8	RV	Childs	Elaine & Walter
Sun, Nov 3	Tue, Mar 4	Store 3	Stor	Childs	Elaine & Walter

Luckily, Able is now at the top since they're now sorted alphabetically!

2) Right-click on Able's reservation cell, and select Customer Details. A dialog will appear with all of their details -- just enter the phone number and any other information needed, and click Save.

Now when you double-click on their name to see the reservation Quick-Info window, it will also include their phone number:

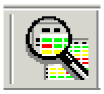


Finding Sites and Customers on the Views

If your campground has more than a few sites, you need a quick way to locate the site you're interested in on the Rack and other views, like On Site. There is a "Search" function designed for this -- and it can also be used to find a customer.

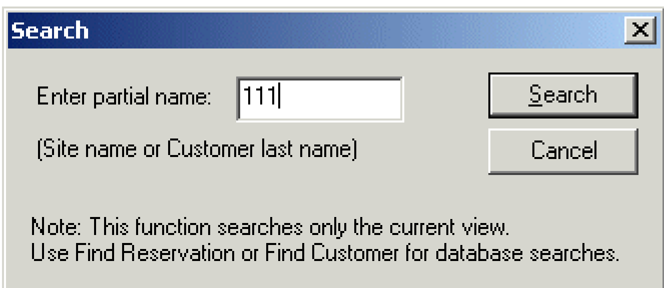
Lets say you need to look at Room 111 on the Rack.

1) To access the Search function, click the magnifying-glass icon on the toolbar:

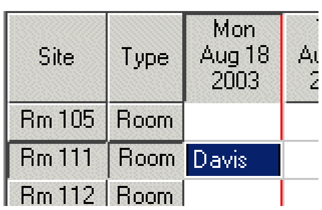


(Alternatively, you can use the shortcut keys **F9** or **Alt-S**.)

2) A Search prompt will appear -- just type in the number (or other unique text to look for):



3) Press **Enter** (or click **Search**), and the Rack will jump so that room is visible (because "111" was found in the site name), and it will highlight the first cell for that site in the grid so you can locate it easily.



When you're done, don't forget to click the **Reset/Today** button to reset the Rack to the top.

Tips:

You can enter any text, not just numbers, and it will look for a site name with that text in it. In the sample database, for instance, try searching for "banq" to find the banquet hall, or just "b" to jump to the first boat dock site.

You can use the same function to locate customers on the views. Just enter a portion of their last name. One thing to remember is that this only works to find the first occurrence, and will only locate them if they're within the scope of the current view (for instance, on the Rack it will only look about 1 month into the future).

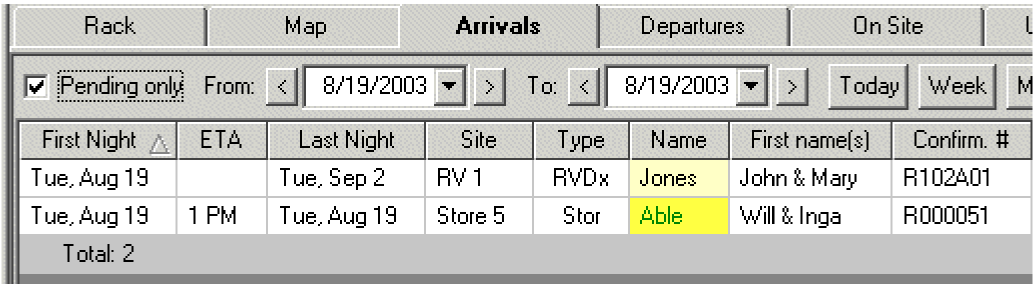
Also note that it always checks the site names first, so if you try to search for a Mr. "Craft" in the sample database, it will actually locate the Crafts hall before it searches for customers.

Checking Daily Arrivals

It often helps to have a list of the arrivals expected today, perhaps for a gate check or just to see how busy you're going to be. It's also a handy view to use when people arrive, since it's easy to locate their reservation with it.

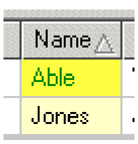
1) Click the **Arrivals** tab. The Arrivals view will be shown, with all reservations starting today:

2) Since we're not really interested in who's already here, click the Pending Only box to limit the list to those we're still expecting.



OK, it's a short list now. When you're not making a reservation, you could leave this view open so that when someone walks in, you can find them immediately. As with the Rack and other views, just right-click on the customer's name to access functions like Check In from the context menu.

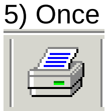
3) The list is normally sorted by date, in case you want to show a list of several days at once. However, wouldn't it be easier to find a customer if they were in order by name? Just click on the Name header (the grey header cell in the grid), and it will be sorted by that column. An arrow indicates the sorted column, and the sorting direction.



This works for any column on any report, by the way. If you need it sorted the opposite direction, just click on the header again to reverse the direction.

4) Maybe you want to print this report to give to a security gate guard. If you print it with all of the default fields, it's likely to be too wide to fit on a page. So first you want to remove fields that they don't need, like phone numbers. Click on the **Options** button, and you can select which fields to show.

5) Once the fields are trimmed down, just click the Printer button:



A preview may be shown, then click **Print**... just like printing receipts.

All of the other tab view reports work the same way -- just select the fields you want, sort by the appropriate column, and print.

Printing the Rack (Long-Range Planner)

If you need a long-range planner, you can print the Rack view -- but don't just use the Print button or else you're likely to get many pages for dates you don't need! There are a couple things to do first.

1) Check the Show Range box.

This will remove all dates except the date(s) selected in From and To. At first it will probably just show one column (today).

2) Select the dates you want to see. For instance, select a To date 10 days from today. Now all of those dates will be shown.

3) If you only want to see a certain site type, select it by dropping down the "All Site Types" list. You can choose a single type or class, or you can use the Advanced option to select multiple types to show -- or even individual sites of your choice.

4) Once it shows what you want, then you can click the **Print** icon (or use the **F8** shortcut key).

Printing a Site Report for Walk-Arounds

Many parks need a report printed so they can spot-check sites to make sure the proper occupant is there, or has left on time, etc. The **On Site** tab view is best used for this, especially if more information than just their name is needed.

1) Click the **On Site** tab. You'll see all sites listed in order, whether they are occupied or not, and the occupant(s) based on reservation dates. Note that the report includes "yesterday" by default, so it includes those who are due to leave this morning but might still be on site. Thus there may be some sites listed twice -- once for the occupant leaving this morning and once for a new occupant arriving today.

Depending on your exact usage, you may want to make a few option changes.

2) You can check the Current Only box to remove any reservations that are already checked out or have not yet arrived. This is useful for seeing exactly who should be in the park right now.

3) If your park is large but is mostly empty at the moment, you may not want to see (or print) all of the empty sites. You can use a different sorting order and it will remove empty sites automatically, but it's probably most useful to keep it sorted by site. Click the **Options** button, and then uncheck the box for "Include empty sites when sorted by site". The report will be "collapsed" to show only occupied sites.

4) As with other views, you can select the site types you want to see and the fields (columns) you want. Then print the report.

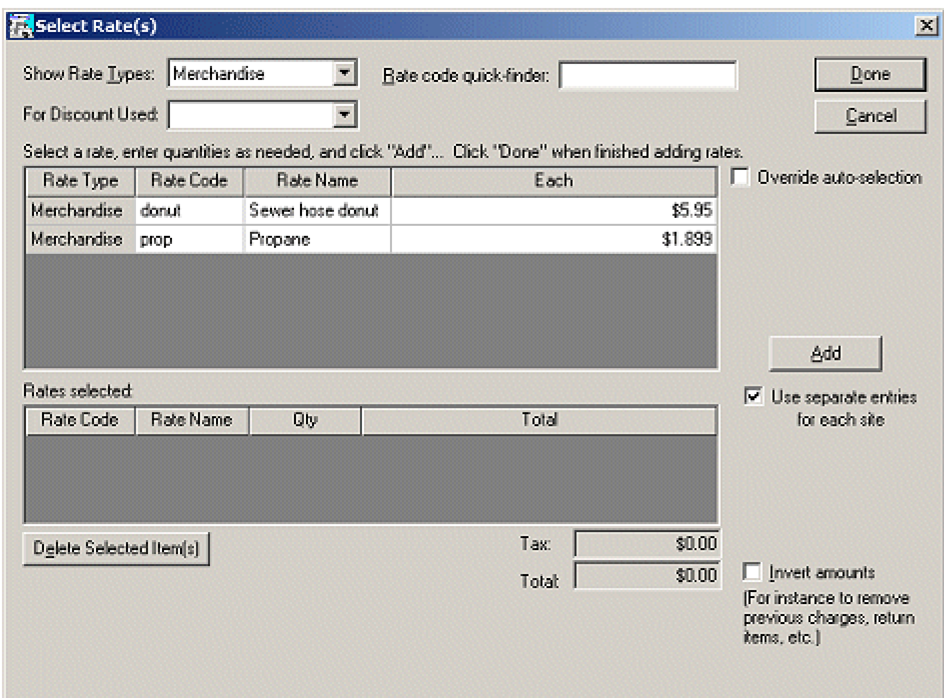
Entering Merchandise Sales

Even if you don't purchase the full Point-of-Sale option, you can still enter merchandise sales on a small scale by setting up merchandise types of Rates. This is suitable for selling a few RV supplies, propane, ice, and so forth.

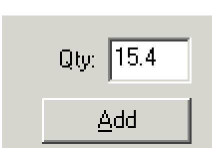
1) Click the cash register icon to start an Unbound Transaction. This means that the transaction is a simple sale, not tied to any particular customer or reservation.

The Transaction dialog will be shown, looking rather sparse this time since there is no reservation information.

2) If you have some merchandise pre-defined as Rates, click **Select Rates**. Any "Merchandise" rate types will be shown.

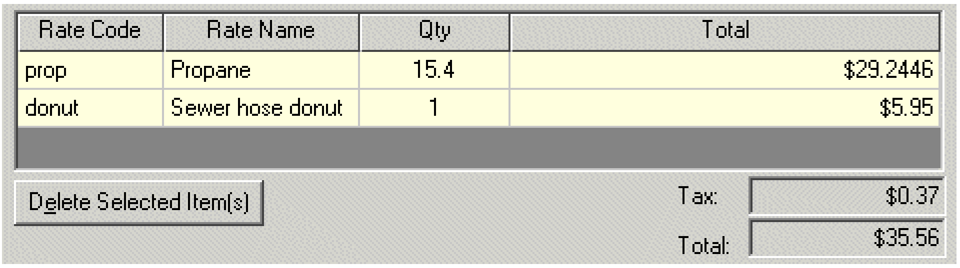


3) Lets say they're buying metered propane, and 15.4 gallons have been pumped. Click the Propane item in the list. A Qty box will appear. Qty always defaults to 1, so you will need to change that to the appropriate qty -- enter 15.4, then click **Add**:



You'll see the item and total in the bottom "Rates Selected" list.

4) Lets say he decides to pick up a sewer hose donut while he's here. Since we know the Qty will default to 1, just double-click the item in the list to add one of those automatically. Now the Rates selected should look like this:

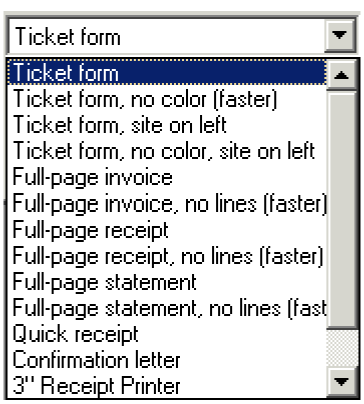


5) Click the **Done** button to finish adding items. It will go back to the Transactions dialog, showing the selected items and the tax (as a separate line item).

Note: If you need to enter a sale for something you don't have a Rate set up for, just use the **Charge** button instead of Select Rates, and enter the information as needed.

6) Now you need to enter the payment. Just click **Payment** and enter a payment just like you do for reservations.

7) For simple merchandise sales, you probably want to print a simple receipt instead of a full reservation receipt. To select a different receipt format, open the list above the Print buttons (where it probably shows Ticket Form now):



8) Select the Quick receipt for a simple full-page type receipt, or if you have a retail-type receipt printer you could use the 3" receipt printer format.

9) Now click **Print Reservation Receipt (All)** to print the receipt, **Close** the transaction dialog, and you're done.

Merchandise Refunds

Refunds are part of the business. Handling Refunds in Campground Master are almost exactly like entering sales transactions, with just a couple differences.

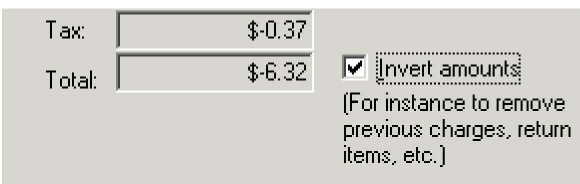
The key thing to remember is that to properly account for refunds you must enter both a Charge (with a negative qty) and a Refund transaction. Entering just the Refund will show the money refunded, but it won't balance to show that the merchandise has been returned (or service not rendered). The goal is to make the charges and receipts balance (the Transactions dialog should show a $0.00 balance whenever you're done with a sale).

Lets say the previous person found that the sewer donut he bought isn't the right size and wants to return it.

1) Click the cash register icon to start an unbound transaction. (If this had been a customer or reservation transaction, you would want to locate that customer or reservation and access Transactions from there instead.)

2) On the Transaction dialog, go to **Select Rates** again and double-click on the Sewer donut item to add it to the list.

3) Now check the Invert amounts box next to the Total:



4) Click **Done**, and you'll see the negative charges and negative balance due (meaning a credit due).

5) Click the **Refund** button. A dialog will appear to enter the refund payment method and amount (which should already be set appropriately for the credit balance). Select the method of refund payment, and click **Save**.

6) Now print a receipt if they need one, and you're done.

Transaction Reports

At the end of the day, you probably want to see the amount of money taken in. In fact, you probably want to know the amount of each payment type, so you can balance your cash drawer and credit card statements, etc. and check for entry errors.

1) Click on the **Transactions** tab. All financial reports are generated using this tab view.

By default, you'll see the view in Details mode -- every transaction line item will be shown, with all of the detail you would ever need. In fact, this "raw" report isn't very useful since it's not organized or filtered.

2) Click the **Summary Options** button. This may be abbreviated if your display resolution is small, or it might not even be visible -- check the Summarize box first if you don't see something like a Summ Options button.

3) A Summary Options dialog will appear, with lots of ways to group, summarize, filter and otherwise customize the transaction report. The two main reports you'll probably want are the first two Quick-reports:

4) Click on **Receipts by Payment Method**. This will take you back to the Transactions tab, but now it's in Summarize mode, showing the day's receipt totals for each Payment Method, and a total at the bottom. It will look something like this:

	8/19/03	Total
Cash	$-11.33	$-11.33
Check	$0.00	$0.00
MasterCard	$60.00	$60.00
Visa	$0.00	$0.00
Discover	$0.00	$0.00
Amex	$0.00	$0.00
Diner's	$26.01	$26.01

(Note the negative Cash amount here, indicating that there were more cash refunds given today than cash payments received.

5) You can see other days by simply changing the From and To dates. Once you have it showing what you want, you can print it out if needed.

Tip: If you see an amount that doesn't look right, uncheck the Summarize box. All of the transactions making up the report will now be shown in Details mode. They will also be sorted and sub-totalled by Payment Method (since the summary report was grouped that way). Now you can check each transaction against your receipts. If you spot a mistake in a transaction, just right-click it and go to Transactions to make the correction. The report (as well as the Summarized version if you check that again) will be updated automatically.

6) To view other reports, just go back to **Summary Options** and click the appropriate Quick-report button. You can also change options and filters, and save the result as a Memorized report for easy recall later.

Making Backups

We can't stress enough how important it is to make regular (**daily!**) backups. Computer crashes due to power surges, Windows lock-ups and other program errors are a fact of life. We've made backups easy so there's no excuse not to do them.

Note that backups are automatically made daily to the hard drive. This is automatic protection against software crashes, but not hardware problems. Floppy backups are recommended -- better yet, move the floppies to another building (or keep duplicate backups) to keep your data safe from fire or other disasters.

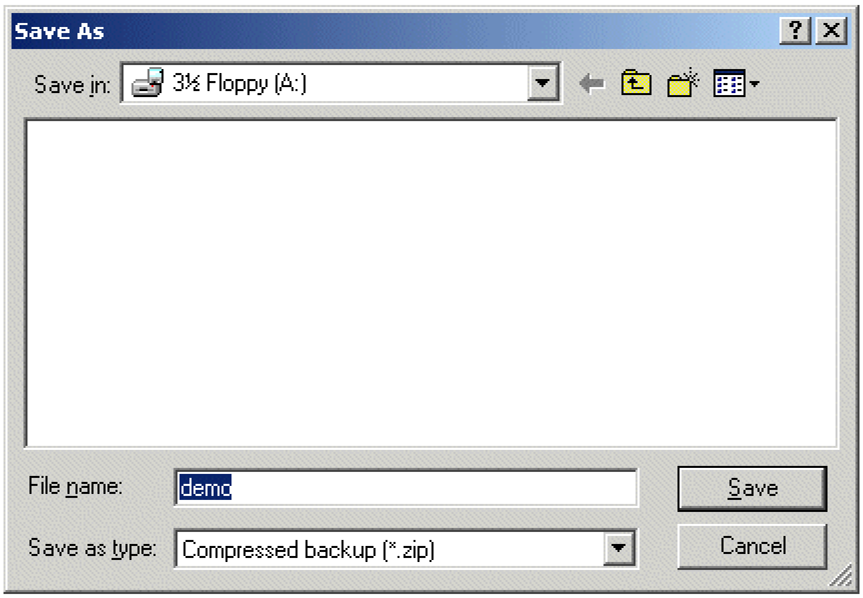
Your data is much more valuable than a few floppy disks or CD's -- don't skimp on backups!

1) Insert a disk in the computer's floppy drive

2) Click on the "Safe" icon (or use Back Up Database in the Maintenance menu).

3) If this is your first backup, a message will appear telling you that you need to select the location. Just click **OK** after reading the message.

4) A Save As dialog will appear:



5) Make sure the Save In selection is the Floppy drive. (Other removable drives like the Iomega Zip drive can be used, but writable CD drives aren't recommended -- see the manual for details).

6) The file name should already be shown, but you can change it if you like (for instance to add the date of the backup) -- now click **Save**.

7) After a short time while it writes the file to the disk, a message will show that the backup is complete. Remove the disk, label it and keep it in a safe place.

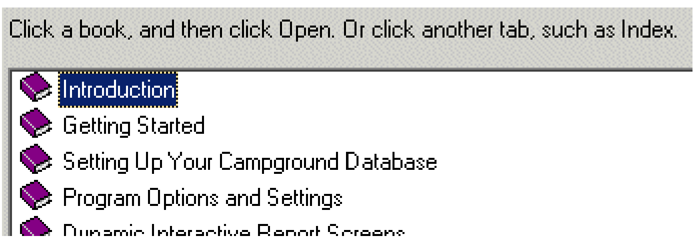
Note that you can re-use backup disks. (If you're leaving the file name the same each time, it will ask you if you want to replace the file.) However we recommend keeping at least a 7-day rotation, so you have a separate backup for each day of the week. That way you're also guarding against floppy disk failures.

Getting Help

Although you've pretty much got it covered once you've mastered the functions covered here, there are many more situations that may not have an obvious solution. We recommend reading the manual or at least referring to its index when you have a question, but you don't need to have a printed manual. All of the manual is also just one key press away.

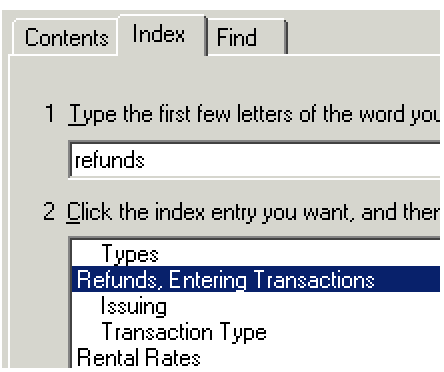
1) No matter where you are in the program, pressing the **F1** key will open the Help file, and it often shows you the appropriate topic for the very function you're using.

2) If you don't remember **F1**, or if the topic it shows isn't what you need, there's always the Help menu. Just select Help Topics to see the main table of contents.



Click on a topic to open sub-topics, and so forth until you see what you need.

3) You can also look for help on a subject using the Index. Click the **Index** tab, and then you can enter a subject:



4) If you really want to find every possible reference (every topic that mentions a word), you can use the **Find** tab.

5) Finally, there's our **free** support. Just give us a call and we'll answer your question or walk you through a procedure. You don't even have to be a customer to get full support. (We wouldn't expect you to buy it if you don't know how to use it!)

Thank you, and **Enjoy!**