# CampWorks 3.15 New Features / Changes

## November 18, 2022

**Reservation Categories**

You can now setup categories to assign to reservations, much like the existing guest categories, but these follow the reservation, not the guest. Create categories like Local, ATV/UTVer, Hunter, Worker, Transient, Long-Term, Grey List, etc to monitor and track different types of reservations. See the Getting Started Guide for information on setting these up. In the reservation there is a new button that will change colors based on the Categories that are set. When clicked, the pop up screen with the options to select the reservation category appears so you can edit the categories for the reservation.



Find Reservations:

You can search for any reservations in these categories in the find reservation screen.

## Reservation Grid:

You can also put the grid in Reservation Category Color Mode so you can visually see them on your grid.



## Reporting:

The reservation category filter can also be used in reporting to limit report results to specific categories.

**New Grid Color Modes**

In addition to the Reservation Category color mode demonstrated above, there are 3 additional alternative color modes: Guest Categories, Payment Status, Balance. Here is a brief rundown on what they mean. Guest Categories is self-explanatory. It works just like Reservation Categories, but is based on the categories assigned to the guest profiles, not the reservations. Payment status can be used to visually see what reservations have received a payment. If any payment has been received on the reservation, then the color is Green. If no payment has been received, then the reservation will show as Red. Note the color scheme works based on the total amount of the payments received and looks to see if it is greater than $0. Therefore, do not use this as your indicator to make sure a guest has paid everything you expected. The Balance color mode can be used to visually identify guests who have an outstanding balance. In this mode Green is $0 balance, Yellow: guest has a credit balance, Red: they owe you money.

**Res Status Change**

We have added a new feature to help administrators deal with unusual circumstances that cause the status of a reservation to be incorrect and allow the status to be changed. There is a grey down arrow in the bottom right area of the reservation screen by the reservation Status. Clicking this arrow will pull up a selection box to change the status to the correct status. The user must have administrator rights to be able to use this feature. It is very important this is used only when all normal methods that would set the status (ie CheckIn, CheckOut, Cancellation, Guest Confirmation) are unable to set the correct status.



**Rules**

New conditions and actions have been added to the Date & Rate Rules screen. On the condition side, there is a new condition option: Part of Stay Includes a Holiday. If any day of the guests' stay falls on a date that has been designated as a holiday date in CampWorks setup, then this condition is triggered. On the Action side of the rule, there are 2 new actions: Change the required deposit & do not allow discounts. These new actions are primarily intended to aid automation of online reservations, since the deposit amount and discounts are manually controlled or overridable by the user in CampWorks, but that is not possible with online reservations. Example of Rules that might make use of these would be:

- No discounts allowed on stays longer than X days
- No discounts on certain high demand rental spaces
- Pay in full deposit if stay includes a holiday date
- No discounts if stay includes a holiday

Note that we have also laid this screen out a little different to try and make it a little more user friendly. It still is a little difficult so contact us if you need help with rules. Note if you select a rule and want to edit it, you have to hit the Edit Rule on the bottom and then edit it in the top section where it says "Selected Rule".



**Guest Profile Management**

We have now made it easier to find and edit guests and to clean up duplicate guest profiles. There is a new filter section in the guest list manager to help you easily filter your guests. Like when you are searching for reservations, you can enter part of a name to get all that match. You can also search by city, state, email and guest ID. Click on the headings of each column to sort results by that column. Probably the coolest new capability is that you can Merge profiles into one simply. This can help to significantly clean up duplicate and unused profiles which will help immensely when making and managing reservations. To merge profiles, select the ones that you want to merge. Note you can select all continuous profiles by holding down the shift key on your keyboard and clicking on the first and last entry that you want to select with your mouse and all in between will be selected. If you want to select non-continuous profiles or want to deselect one in the block you already selected, hold down the CTRL key and click the one you want (don't want) and it will toggle its selection. Once you have selected the ones you want to merge, click Merge Profiles. CampWorks will ask which guest ID you want to keep. It will then merge all reservations, rigs, credit cards, etc from those profiles into the selected profile. If the selected profile had blank fields in the basic information (ie name, email, address… ) and any of the other profiles had data in those fields, the first one that has data for that field will be merged into the

main profile.  For example, if the street address is blank in the main profile and the first profile that is going to be merged has an address of 123 Easy Street, 123 Easy Street will be merged into the street address field of the main profile.  Now lets say the 3rd one that is to be merged has a different street address, it will not be merged.  After the merge is complete, the "extra" profiles are deleted forever, so non-merged information will be lost.  However, backups prior to the merge date will still contain the data, so if it was important to recover that old data, it would be possible as long as you retain a backup prior to merging the data.  We would strongly encourage you to make sure you have a permanent backup prior to performing your cleanup operation, just in case!



We have also made improvements in list use, positioning after changes, deletion, etc to make the process of managing guest profiles easier.  There also is a delete profile button right on a profile, so you no longer have to delete it from the master list.  All reservations must be moved to another profile, though before you can delete the profile.  That can be tedious and why the merge function is so helpful.

**AutoCharge Rate Codes**

There are a couple of new Rate Code options for auto charging Annual guests.  This enables a long term "reservation" that will be automatically charged the current rate for that rate code automatically each year.  There are 2 options (one based on anniversary date and the other on a specified date).  If the recurring annual charge date is set to 1/1 (January 1), then on the first of each year a new rent charge will automatically be added to the reservation.

## Monthly Statements

Monthly statements have received a few upgrades also. To make statements as clean and simple as possible, blank sections of the statement are now hidden. If you charge rent only and there is no electric meters, the electric section is hidden. Visa versa, is also true. If the monthly statement only includes electric meter readings, then the rent section is hidden.

We have also added the current balance to the Monthly Statement screen and enabled the option to mass email monthly statements.



## Autosave How found Out

You no longer have to press save in order to save marketing data (How Found Out). As a matter of fact, the Save button has been removed. If you make a selection when doing a search, the selection will automatically be logged. Same thing applies when making a new reservation from the grid or map.

**Reporting Updates**

We have added a new financial report to view credit. The new report is called "Guest Accounts with a Balance" in the Financial Reports: General category. It will list any guest accounts that have a non-zero balance (ie balance moved from a reservation to the guest account, or credit issued to the guest's account).

## Guest Accounts with a Balance
### Date: 11/17/2022

| GuestID | Name | City | State | Account Balance |
|---------|------|------|-------|-----------------|
| 0 | Maintenance, Keith D | Hutchinson | MN | $2,256.11 |
| 2221 | Jackson, Zelda | League City | TX | ($523.13) |
| 2808 | Jackson, Ron | Houston | TX | ($29.70) |
| 3636 | Johnson, Keith D | Hutchinson | MN | ($154.64) |
| 3761 | | Franklin | MN | $20.00 |
| 3779 | | | | ($23.88) |
| **Grand Total** | | | | **$1,544.76** |

The cancellation report has been updated to include additional information and totals:

## Cancellation Report
### Dates between : 05/01/2022 – 11/17/2022

| Res # | Last Name | First Name | Date Made | Date Cancelled | Employee | Deposit $ | Refund $ | Diff | Notes |
|-------|-----------|-----------|-----------|----------------|----------|-----------|----------|------|-------|
| 6381 | Johnson | Bradley | 4/8/22 | 5/24/22 | Keith | $159.44 | $-138.44 | $21.00 | |
| 6389 | Johnson | Keith | 4/11/22 | 5/24/22 | Keith | $167.05 | $0.00 | $167.05 | |
| 6438 | Johnson | Keith | 8/25/22 | 10/12/22 | Keith | $58.20 | $-33.70 | $24.50 | |
| **Grand Totals:** | # of Cancellations: 3 | | | | | $384.69 | $-172.14 | $212.55 | |

As explained earlier, the report selection screen also has new filtering capability for Reservation Categories which will work with many of the existing reports. If the guest category or reservation category filter is being used, the report will include this information in the subtitle like shown below.

**All Reservations**

|       |          | All Dates | Reservation Categories: Hunter, Local, Long-Term | | | | | | | |
|---------|----------|-----------|-----------|-------|----------|----------|------------|-------|-------|
| **GuestID** | **LastName** | **FirstName** | **Rntl Space** | **Res #** | **CheckIn** | **CheckOut** | **City** | **State** | **Zip** |
| 3636 | Johnson | Keith | 4 | 6350 | 6/29/22 | 7/1/22 | Hutchinson | MN | 55350 |
| 3636 | Johnson | Keith | 1 | 6410 | 11/1/22 | 1/1/23 | Hutchinson | MN | 55350 |
| 3636 | Johnson | Keith | 22 | 6468 | 10/31/22 | 12/30/22 | Hutchinson | MN | 55350 |
| 3636 | Johnson | Keith | 10 | 6469 | 11/3/22 | 12/3/22 | Hutchinson | MN | 55350 |
| 3786 | Johnson | Trent | 11 | 6480 | 11/11/22 | 12/2/22 | | | |
| 3786 | Johnson | Trent | 12 | 6481 | 11/11/22 | 1/11/23 | | | |

**Email**

Email Templates:

Earlier this year, we added the ability to create nice looking (HTML) emails. Now we have added the ability for you to create, save, load custom email templates. Adding more capability to email marketing is something we plan to expand on in this next year, but now you can create nice looking emails with different fonts, images, colors, etc and save them so they can be reused. This way, you can open an existing one edit it slightly and then send it to a different list. Or create one for a special event and save it and then use it as your starting point for next year's event announcement.

Email Setup:

We have made a slight change with email setup, to make it easier for those of you that have multiple computers and use the same email setup for every computer. The setup used to be stored on each computer, which is nice for flexibility (allows different email accounts to be used per user or per computer), but we have found that nearly everyone uses the same email setup for every computer / user. To make setup and changes easier for multiple computers or when replacing computers, if you only use one email setup, we recommend you change the setting in Setup Options, Software Options, System Admin tab to all workstations use the same.
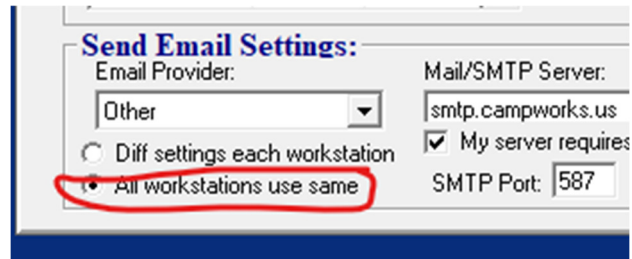
Automatic Email Reminders:

Automatic email stay reminders are a powerful tool to avoid mistakes and to remind guests about their upcoming booking. This way you avoid the awkward conversations with guests about your cancellation policy because they forgot that they made a reservation. You can turn on automatic email reminders in Setup Options, Software Options, Program Flow Tab, Additional Options button. See the Getting Started Guide in Help for setup details.
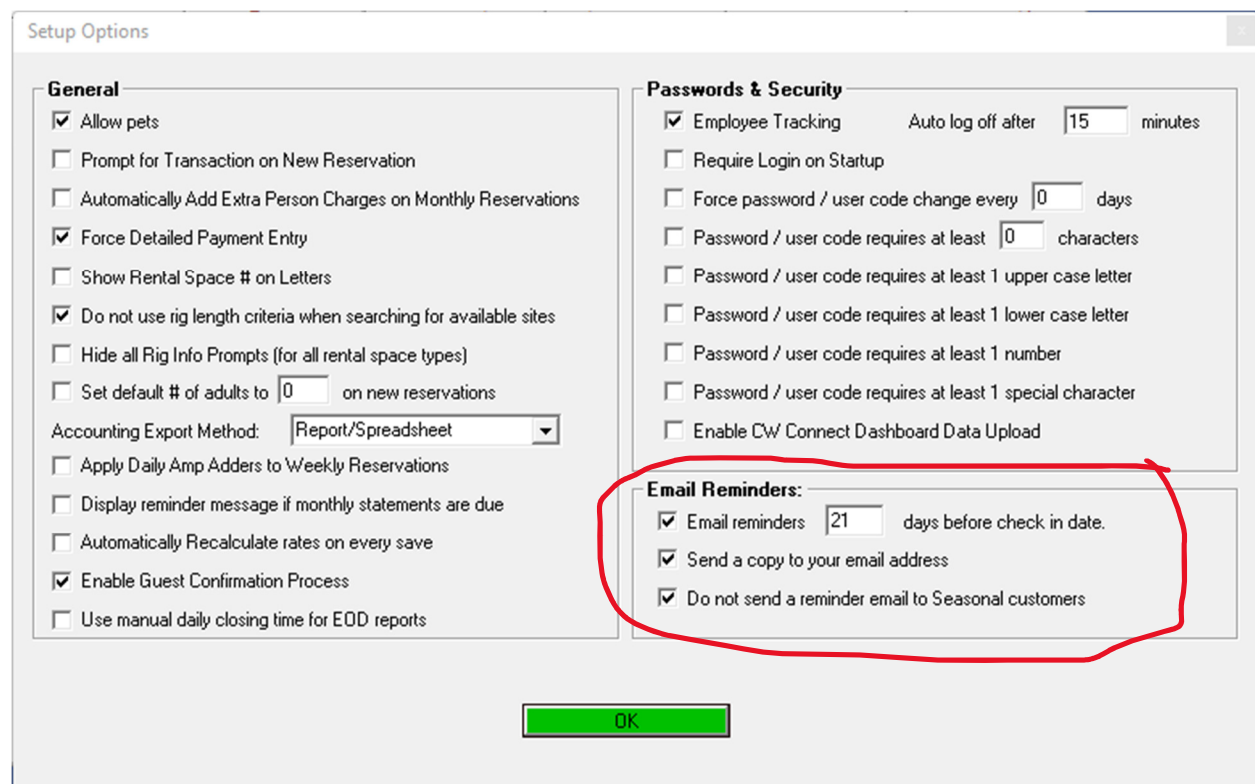
**Credit Card Processing**

In order to comply with Visa/Mastercard rules, merchants are supposed to ask the card holder if it is OK to store their card information. Therefore, we have added a question prompt both in online reservations and in CampWorks asking if the card should be stored in the guest's profile. This is an important change, as you can no longer rely that you have a card on file. If a reservation is made online, the guest can say no to saving the card. The initial transaction will go through as normal, but the card will not be stored in the guest's profile and you will not be able to look up the card and process a new transaction on the card. You still will be able to issue a refund on the original transaction, however.

**POS**

The POS system now has a new option in setup to allow the store location to be switched. If you have more than one store (ie Campground & Marina), you can use this function to change the location of the workstation to view inventory/transactions, make transactions, etc temporarily using the new location. This is especially great for a manager's office who needs to view / edit transactions in multiple locations. Set can be used to reset the workstation and all inventory, transactions, etc to a new location (ie set or rename the existing location) and switch is used to temporarily switch to a new existing location without modifying any historical data.

**Online Reservations**

Blacklist guest identification

There is now a check to see if the guest has been banned.  If the guest is on the blacklist, the guest will be notified that the online system is not able to make their reservation and they must call for a reservation.

Rules:

As described in the rules section, there are now new discount, deposit, and holiday date options to manage the requested deposit amount and whether discounts are allowed or not.

Required Fields:

Added * to indicate required fields to make it clearer for guests.

New Search Message Option:

We have added a new message option to display at the beginning of the reservation process.  This is great if you need to give some important information before they even start the search process.  For example, call for same day reservations.  By the way, if you are not aware, we can turn off the ability for guests to make same day reservations, so they don't book a stay for the current day after you close.  Just let us know if you want that set.

New Rig Information Options:

We have added the option for you to collect more rig information (License Plate, Rig Year)



Support for CGNAT / Ability to eliminate need for Router Port Forwarding:

We are seeing more of our customers switch to StarLink satellite internet services. Starlink uses a newer technology called CGNAT (Commercial Grade Network Address Translation). This technology is used to solve a problem with the internet running out of Ipv4 addresses. Unfortunately, CGNAT is unable to support port forwarding, which we use to allow communication between our server and your main CampWorks computer to enable online reservations hosted from your local CampWorks install. We have found a new solution to eliminate the need for port forwarding and can now setup a private "tunnel" for secure communication that eliminates the need for port forwarding and router setup. For now, we are only using this on an as needed basis, for customers who are unable to use port forwarding, but it may become our standard going forward. Online reservation code has all been updated to allow connections using either method.