CHAPTER 2 – SETUP

OVERVIEW

- Add in your staff as Astra Users and you’re ready to start booking.
- The software is shipped pre-configured with your Maps, Grid, and Rates etc.
- Customization is covered throughout this chapter if changes are needed
- For setup not covered in this manual, call Technical Support at: 1-800-547-9147

Before you start using the software for reservations and other tasks you should add yourself and your staff members into the system as Astra Users.

USER SETUP

To add or make changes to Astra users in the system you must first be logged in with an Admin. Account.

1. Application > Admin > App Security > Users

2. Click on the New Button to add a new user.
Chapter 2 - Setup

User Profiles

3. Fill in the following when setting up users:

- Login (User name they log in with)
- Password (Temporary password, gets changed upon first log in)
- First Name (User’s First Name)
- Last Name (User’s Last Name)

Access Levels

4. Set an Access Level to control how much access the user has in the program.

- Admin for users allowed to make changes to the software and property setup.
- Application User for non-administrative users and general users of the program.

5. Select a Role Name that best describes this user’s role in your organization from the drop down menu.
6. Key in Contact information for the user: Home Address, Phone, Email, etc.
7. Key in Initials for the user that you’ll see stamped on their transactions
8. Click on the Update button to save your work.

- Commissions are optional depending on whether you are tracking sales agencies or not.

After clicking on the Update button, you should see the user you added, in the user list window.
Chapter 2 - Setup

User Roles

- Roles describe what the user’s responsibility level is in your company.
- A role must be assigned to a user before they can access a property
- Choose a role that best suits this user’s position in your company.

To assign a role to a user:

1. Open the User Profile if you don’t already have it open
2. Select an appropriate Role Name for this person from the drop down menu.
3. Click on the Update button.

Role Permissions

✓ Role Permissions are additional security measures used to control access in the system.

1. Make the following main menu picks to set or change permissions on a user’s role, as an Admin user,

   Application > Admin > Workstations > Payment Servers
Payment Server Screen

Click on the Machine tab to access the local computer.

Right click on your computer name, then left click on the Permissions option.

User Role Permissions Screen

You can set role permissions such as View and Delete for Manager, Assistant, Clerk, and Novice Roles here.

*Checkboxes indicate that user having selected role can use selected function
User Property Assignment

Property Screen

1. A user must be assigned to a property in order for them to access it.

This is done via the Property Screen in Astra using the following menu selections:

1. Application > Admin > App Security > Properties

2. Double click on the Property Name and open the:

Property List
3. Click on the Other tab, then
4. Click on the Users tab.
5. Select the user
6. Click on the >> button to add a user or the << button to remove one.
7. Click on the Save button to save your settings.
8. Click on the Update button to update the property information,
CLERK TRACKING

To turn on Clerk Tracking and force users to key in their password when they make changes:

1. Make the following Menu picks:

   Application > Admin > App Security > Properties
Clerk ID’s are used to track clerk activities in the system. Campground Manager Astra can be set to prompt a user for their clerk ID whenever they make a reservation, take a payment or completes a POS sale or do a total out.

Clerk ID’s for Admin users can be manually assigned whereas clerk ID’s for non-administrative users are generated by the system and can be changed to a new system generated number using the Renew button.

1. Log in as the Clerk you wish to view or renew a Clerk ID for.

2. Log in a second time using the following menu selections:

   Astra > User

   ✓ The ID shown is the user’s clerk ID.
   ✓ To generate a new ID click on the Renew button, then the Update button.
1. Make the following menu selections to customize the Astra Screen and Text Colors:

   Astra > Application

   ![Astra Screen Screenshot]

   **Application Preferences**

   2. Click on the Application Preference drop down menu and choose a screen item you wish to change the colour for.

   ![Application Preference Window]

   3. Click on the Save button to save your changes and update the colors.

**Screen Colors**

Screen colors can be customized by selecting

1. Background Color
2. Button Text Color
3. Checkbox Text Color
4. Label Color
5. List Background Color
6. List Text Color
7. Tab Pane Text Color
User Preferences Screen

The User Preferences screen is where you manage user profiles and attributes from such as:

- User ID, Initials (Clerk ID), Login Name, Password, First Name, Last Name etc…
- A Default Property for the user to log on to can be assigned here as well.

The User Preferences Screen opens after logging in a second time as that user during their session using the Astra > User menu selections from the main menu at the top of the Transaction Dashboard

4. Key in and select (where necessary) the desired User Preferences.

5. Click on the Update button to save your changes.

- The Initials assigned to the user will get stamped on transactions and payments
- Only an Admin account can set their own ID
- Standard User Accounts get assigned system generated clerk ID’s that can be renewed if they don’t like the number. Assigned, but these types of users can not set their own ID. They are system generated.

Transaction Dashboard Default

To set your Campground Manager Astra software to open the Transaction Dashboard automatically after logging in,
make the following main menu selections:
Application > Admin > Workstations > Payment Servers

1. Click on the Machine tab of the Payment Server Setup Screen and inside the Open Transaction Dashboard upon Login checkbox so it’s checked, as shown below.

2. Click on the Save button.
Printer and Cash Drawer Setup

Campground Manager Astra is compatible with various types of pre-tested and approved report and point of sale printers and devices that have been tested by our support team.

Please contact Technical Support at: 1-800-547-9147 or by email to support@campgroundmanager.com prior to the purchase of any hardware you plan on using with your Campground Manager Astra software as some brands and models are not supported unfortunately due to compatibility issues with the software.

Printer and Cash Drawer Setup are accessed via the Payment Servers Screen

Make the following menu selections to set up printers and cash drawers.

Application > Workstations > Payment Servers

Click on the Machine tab, then double click on the device or computer name you want to set up printing on, or select it with a single left click, then click on the View button.
### Chapter 3 - Basic Training

#### Payment Server Setup

<table>
<thead>
<tr>
<th>MAC Address</th>
<th>68-68-68-68-68-68</th>
</tr>
</thead>
<tbody>
<tr>
<td>Machine</td>
<td>Max's Laptop</td>
</tr>
<tr>
<td>Process Name</td>
<td>USER1</td>
</tr>
<tr>
<td>Program File</td>
<td></td>
</tr>
<tr>
<td>Work Directory</td>
<td></td>
</tr>
</tbody>
</table>

- [ ] Print without prompt for destination
- [ ] Close authorization screen
- [ ] Debug authorization process
- [ ] Use Cash Drawer
- [ ] Open Transaction Dashboard upon Login

**Output Format**

- [ ] Screen
- [ ] Preview
- [ ] Printer
- [ ] Other

**Receipt Printer**

- EPSON TM-T88III Receipt

**Report Printer**

- HP Laserjet 4050 Series PCL 6

**Escape Sequence**

- EPSON TM-T88III Receipt
- HP Laserjet 4050 Series PCL 6
- HP Laserjet 4050 Series PCL 6
Receipts - Setting Default Number to Print

- Number of Receipts are set on the Point Of Sale Tab on the Property Setup screen. Be sure to click on the Update button if you make changes you want to save.

Print without prompt for destination

8. Checkmark this option to bypass the print destination prompt and send the job immediately to the printer.

1. Make the following menu selections:

Application > Admin > Workstations > Payment Servers

Click on the Machine tab, then, double click on your machine name or MAC Address to get to this screen.
Inventory List

1. Open your Inventory List to access your sites.
   Work > Inventory > Inventory List

2. Click on the Search button to display all inventory items in the system by code which is the default.

3. Double Click on Inventory Code that matches the site type you want to edit e.g) W/E/S for Water Electric Sewer sites.

Accommodation Screen

You can access the site rates and details from here via the inventory list.

4. On the Accommodation Screen, click on the Site Tab to access your sites.
5. Double click on a site number to edit.
Site Attributes

9. Site attributes describe the characteristics and features the site has.

Double click on an attribute to change it, make your changes, then click on the Save button. Double click on an attribute to edit it. In this example, length was selected so we can change the length here.
1. Change the length or any other desired attribute.

2. Click on the Save button to save your changes
Site Attributes

The following site attributes can be changed from the Accommodation Site Screen.

*Item Desc.* Description of the item

- Code
- Skew No
- Vendor
- Vendor Prod No.
- Group
- Category
- Taxes – Taxes Charged
- Discounts – Site Discount
- Commissions
- Sales A/C#
- Deposits – Deposit Rules Dropdown
- Class
- Payment Schedule
- Site Type
- Site No.
- S/N Segment
- Item Desc
- Length – Site Length
Email Setup

Astra must have an Email Server configured in to successfully send outbound emails. Inbound mail is not a feature and is not supported.

To configure Astra to send emails, make the following main menu picks.

Setup > Email > Mail Server

**Mail Server Settings**

Fill in valid SMTP email server settings, then click on the Update button to save your changes.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Server</strong></td>
<td>Name or IP Address of a functional outbound SMTP email server</td>
</tr>
<tr>
<td><strong>Port</strong></td>
<td>Port Number traffic is being allowed through for email</td>
</tr>
<tr>
<td><strong>SSL</strong></td>
<td>Secure Socket Layers on-off setting. O=Off 1=On</td>
</tr>
<tr>
<td><strong>Timeout</strong></td>
<td>Length of time before sending times out.</td>
</tr>
<tr>
<td><strong>User</strong></td>
<td>Email address for sending emails</td>
</tr>
<tr>
<td><strong>Password</strong></td>
<td>Email address account password</td>
</tr>
<tr>
<td><strong>Authentication Type</strong></td>
<td>Authentication on-off setting. O=Off 1=On</td>
</tr>
<tr>
<td><strong>Wait Interval</strong></td>
<td>Length of time waited between email sends.</td>
</tr>
</tbody>
</table>
METERING

✓ Setting up meters in Astra for tracking and billing requires a one-time set up, unless changes are needed later.
✓ This section covers Meter set up only. Meter Invoicing is covered in Chapter 3

The items that need to be created or carried out for Astra Meter Setup are:

1. Utility Category
2. Utility Inventory Item
3. Utility Price Schedule
4. Site Type Meter Linking
5. Assign Meters, Dates and Readings to sites.

Utilities

✓ Utilities such as Electricity and Gas must have categories set up in Astra to function correctly.

Category Setup

1. Open the category setup screen from the Setup menu.
   Setup > Inventory > Category Setup

2. Click on the New button to create a new category.
3. Key in the name Utility then select appropriate values for the other attributes from the drop down menus.
4. Click on the Save button to save a new Category
5. Click on the Close button to close the Category window.

**Utility Inventory Item**

1. Open your Inventory List with the following menu picks:

   Work > Inventory > Inventory List

2. Click on the New button to create a new inventory item for your utility.

3. Click on the Proceed button
4. Key in or select the following attributes for your inventory item.

- **Item Description** - Inventory Item Description
- **Code** - Inventory Item Code
- **Skew No.** - Inventory Item Skew No. (automatically generated)
- **Supplier** - Inventory Item Supplier
- **Vendor Product No.** - Vendor Product Number if the supplier uses one.
- **Track Qty ?** - Apply a check mark to track the quantity as this is a trackable item
- **Sale Unit** - The unit of measure for the item. kWh for Kilowatt hours
- **Inv Cost** - Your cost for this item
- **Sug. Price** - Suggested price (not applicable for this kind of item)
- **Margin Calc.** - Calculate the margin on the sale
- **Track Meters** - Track meters for this item. Check mark this item for utilities.
- **Group** - Inventory group this item belongs to
- **Category** - Inventory Category this item belongs to
- **Taxes** - Taxes assigned to the price
- **Discounts** - Discounts that can be used with the price
- **Commissions** - Commissions that can be allocated
- **Sales A/C #** - Accounting General Ledger number and description for this item
- **Deposits** - Deposits expected for this item
- **Class** - Classification for this item
- **Payment Schedule** - Payment Schedules this item can be assigned

5. Click on the Save button when you’re done filling in details.
Utility Price Schedule

10. You need to create a price schedule for your utility in order to do your billing.

1. Click on the Price Schedule tab of your Utility inventory item
2. Click on the New button to create a new price schedule

3. Select Rack from the Rate Plan drop down menu
4. Select Store Items from the Rate Scheme drop down menu
5. Select a Rate Span from the Rate Span drop down menu to set the effective dates for your utility rate. In this example 2105 Full Season is selected to make the rate go the full 2015 season.
6. Select No Breaks from the Quantity Template to set a single line item in the rate
7. Select kWh for Kilowatt Hours as the Qty Unit.
8. Select a Tax to assign a tax to the rate
9. Select a Discount if desired
10. Select a Sales A/C # to assign a General Ledger description and number to track the sales in your accounting.
11. Key in a Variable Rate equal to the per kilowatt hour electricity usage rate you want to bill.
12. Click on the Save button to save your utility price schedule.
13. The Price Schedule Setup Wizard screen will open
16. After clicking on the Save button, you should see an active Price Schedule assigned to your utility.

19. Double clicking on the Price Schedule will let you view and change pricing details.
a.i.1. Price Schedule Meter Assignment

✓ In order for your meters to inherit your price schedule, you must assign your meters to your utility

1. Click on the New button to add a meter to your utility.

2. Key in a site number you wish to add a meter for to your utility.

3. Click on the Save button to add the meter to the utility inventory item.
37. **Site Meter Setup**

38. 1. Open your Inventory List
2. Open the Accommodation Screen for the site type you want to assign a meter to.
3. Click on the Site Tab to access your sites
4. Double click on a site number to edit it's details.
5. Click on the Meters Tab and select a site number for Electric, Water and Gas meters from the drop down.
6. Click on the Save button to save your changes.
7. Click on the Close button to close the window when you’re done with it.

41.
a.i. Adding a Meter

On a Utility Category Inventory Item screen:

1. Click on the Meter tab.
2. Click on the New button

a.i.1. Adding a Meter to a Utility Rate
21. **a.i.1. Rolling Down Changes**

22.

23.

24.

25.

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27.

28.

29. **a.i. Linking a Utility Rate to a Site Type**

30. 1. Locate the site type by Code name in the inventory list
2. Double click on it to open it.
a.i. Meter Assignment

36. Before you can begin Meter Assignment the Utilities Setup steps outlined previously must already be completed.

37. Use the following menu selections to assign meters to the sites and setup the last read dates and reading values:

40. Setup > Park > Meter Assignment

41. 1. Select a site type from the Accommodation drop down menu.

44. 2. Select a meter for each site that needs one using the Meter No. drop down menu.

47. 3. Key in the last read date into the Last Read field.

48. 4. Key in the last reading into the Last Reading field.

50. 6. Close the Meter Assignment window and your meter should be ready to use.
a.i. DISCOUNTS

49. Discounts can be set up and assigned to sites and point of sales items in a logical order by:
   1. Creating discount codes.
   2. Creating discount schedules
   3. Assigning the codes to a schedule
   4. Creating discount programs
   5. Linking the schedules to programs
   6. Linking discount programs to site types or point of sales items that you will allow the discount to be used on.
   7. Linking the Discount Program to desired Price Schedule Items (rate items)

a.i.1. Discount Codes

53. Discount Codes are created as place-holders to identify which discount you are applying.
54. The first step is to add discount codes into the system to discount prices for sites and Point Of Sale Items.
55.
56.
57.

1. To Setup a discount in the system you start by creating a Discount Code using the following menu picks:

   a.i.1. Creating a New Discount Code

   2. Click on the New button on the Discount Setup Screen.
76. **Discount Code Setup**

When the Discount Code Screen opens key in or select the following:

78. **Name**

The name should describe the purpose of the discount

79. **Expenses**

This field is where your General Ledger account description could be selected from a pre-defined account table

80. **Multiplier**

The Multiplier is a decimal equivalent number for the percentage, eg) 0.2 would create a 20 percent discount.

81. **Amount**

A flat amount is specified here eg) 10 for ten dollars.

82. **Min Amt**

The minimum amount that must be spent to qualify for the discount

83. **Max Amt**

The maximum amount that can have a discount applied to it.

84. **Use Sales Account**

Checked: Deduct the discounted value from the site revenue in the accounting reports

Unchecked: Break the discount out as a separate line item with an account number or design the accounting reports

87. **Transaction Types**

1. Choose a transaction type to apply the discount to.

88. **Sales**

Apply the discount to site Accommodation Sales such as RV Sites, Rental Units, etc.

89. **Purchases**

Apply the discount to Point Of Sale Purchases.

90. **10 percent Seniors Discount using a system multiplier of 0.1 as shown here:**

91. **Apply**
2. Set valid dates.
3. Click on the Save button to save your work and add the discount code into the system.
a.i. Discount Schedules

Discount Schedules are used to connect discount codes to discount programs and control how Discount Codes are applied. A discount must belong to a schedule. Multiple discount codes can be added to a schedule.

1. Click on the New button from the discount tab of the discount setup screen to create a new discount schedule.

2. Key in a Name that best describes the general usage of the schedule.
   - The Discount schedule name given should be generic in nature to allow other types of discounts to be used with it. For example, the name Camping Discounts has been used with this particular schedule to allow for various types of camping discounts to be used with this schedule.

3. Select a Transaction Type to apply this schedule to

4. Click on the Save button.
a.i.1. **Linking Discount Codes to Discount Schedules**

Once discount codes and schedule are created they need to be linked to one another.

1. Open the Discount Schedules List.
2. Double click on a discount code to link it to the schedule and add it to the right side.

3. Click on the Save button to link the discount code to the discount schedule.

4. Click on the Close button to close the window when you’re done.
a.i. Discount Programs

135. Discount Programs are used as menu selections on the site type screen when making a reservation.
136. Discount schedules are linked to the desired discount program so they can be triggered automatically when a date range is specified during a reservation or booking.

1. Click on the Discount Programs Tab.
2. Click on the New button to create a new discount program.

4. Fill in the Name, Transaction Dates and Comments.
5. Click on the Save button.
a.i.1. **Discount Program List**

Once saved, your discount program will appear in the list.

---

a.i.1. **Linking Discount Codes to Discount Programs**

You link Discount Codes to Desired Programs to achieve the desired amount of discount, especially if you have more than one discount code that needs to be part of a particular discount program.

1. Click on the Discount Programs tab to open the discount programs screen.
2. Double click on the discount code name you wish to link to the desired discount program.
3. Click on the Save button to link the discount code to the discount program.
a.i.1. Linking Discount Programs to a Property

Discount Programs need to be linked to the property you want to apply them to.

1. Open the Property Screen using the following menu picks:

   Application > Admin > App Security > Property

2. Double click on the Discount Program to add it to the right side and link it to the property.

3. Click on the Save button to save your changes.

4. Click on the Update button to update the program.
Lastly, you must link the Discount Program to a Site type. This is done by opening the Accommodation Screen for the desired site type.

1. Open the Accommodation Screen by opening the Inventory list using the following menu picks:
   Work > Inventory > Inventory List

   ![Inventory Screen](image)

   When the Inventory List opens:

   2. Click on the Search button to display a list of Accommodation Types to link the desired discount program to.

   3. Double click on a code that matches the Item Description or site type you wish to add the discount program to.
1. Click on the Discount Programs Tab
2. Double click on a discount program name on the right to add it into the left side.
3. Select the Discount from the Discounts Drop Down menu on the right.
4. Click on the Save button on discount program list.
5. Click on the Save button at the top of the Accommodation screen and your discount should be ready to use.
To roll down changes to any items currently linked click Yes, or No to not roll down your changes to linked items.

Lastly, to complete the desired discount set up, you must apply the discount to select rates by opening the Accommodation Price Schedule Screen and selecting the discount on the rates you wish to discount (daily, weekly, monthly rack items.)

Open the Price Schedule Screen to add the discount to the desired Price Schedule(s) by clicking on the Price Schedule Tab on the Accommodation Screen.

Open Price Schedule Items that span the dates you want to apply a discount to by double clicking on them.
a.i.1. Applying a Discount to a Price Schedule Rack Item

9. Select your desired discount once you open your desired Price Schedule (rate item).
10. Click on the Save button to save your changes and add the discount to the desired price schedule.
11. Repeat the process for any additional price schedules you wish to apply your discount to.

Discounted Accommodation

In your reservation, you should see your Discount in the Discounts Program drop down menu on the Site Type Screen when you make a reservation if it was set up correctly and the reservation price should be adjusted for the discount automatically when you select it.
Customer Classes

Customer Classes drive the rates in the system, so depending on which Customer Class you assign to a customer during a stay, their accommodation price can vary.

Creating a Customer Class

1. Make the following menu picks to create a Customer Class:

2. Click on the Customer Class tab on the Application Classes Setup screen.

3. Click on the New button.

4. Key in a name for your class that best describes the type of customer you have.

5. Select a Rate Plan from the drop down. The Rack rate is the default rate structure already in the system.

6. Check or leave Unchecked the Use for online booking box

7. Key in a Display Order number. This is usually sequential based on the first one in the system.

8. Click on the Save button.

☑ You are returned to a list of your classes after clicking on the Save button on the classes set up screen.
<table>
<thead>
<tr>
<th>Customer Class</th>
<th>Inventory Class</th>
<th>Rate Plan</th>
<th>Use Online</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Direct</td>
<td>Direct</td>
<td>Block</td>
<td>YES</td>
</tr>
<tr>
<td></td>
<td>Direct</td>
<td>Block</td>
<td>NO</td>
</tr>
</tbody>
</table>

**Note:**

- Use the buttons at the top of the table to navigate between different views.