

# HLS Holiday Manager Software Manual

## Getting Started

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**HLS Solutions Limited**  
The Astrolabe,  
Cheddar Business Park,  
Cheddar, Somerset BS27 3EB

t: 0845 388 8635  
e: [info@hls-solutions.com](mailto:info@hls-solutions.com)  
w: [www.hls-solutions.com](http://www.hls-solutions.com)

.....  
Specialists in software,  
website and design solutions  
for the holiday letting industry  
.....

**HLS Solutions Limited**  
Registered in England and Wales  
No. 07104476

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## Introduction

Once the HLS Holiday Manager software is installed, and you have set up the Company System Settings as detailed in the System Settings Manual, you can start to add information into your system. This manual will cover the adding of new records onto the system, plus viewing and amending existing records already added.

## Add New Record

To add new records into the system we will start with the Add New Record button as shown below:

**Holiday Manager** Version 2.0.26.34694 [Logout](#)

Daily Tasks | Appointments | Arrivals/Departures

Title	AssignedTo	Status
-------	------------	--------

30/04/2013 | 30/04/2013 |  All Dates  
tom |  All Users

Invoice No	Inv. For	Inv. Date	Due Date
<a href="#">INV00002</a>	Holiday Maker	06/12/2010	26/06/2011
<a href="#">INV00003</a>	Holiday Maker	06/12/2010	15/01/2011
<a href="#">INV00004</a>	Holiday Maker	09/12/2010	05/12/2010
<a href="#">INV00005</a>	Holiday Maker	06/01/2011	06/01/2011
<a href="#">INV00006</a>	Holiday Maker	01/01/2011	06/01/2011

[Refresh](#)

- Add New Record
- View/Amend Record
- Daily Tasks
- Booking & Availability Schedules
- Appointment Diaries
- Property Maintenance
- Send Letter
- Reporting
- Marketing & Website
- Daily Accounts
- Latest Activity
- Account Reporting
- Print/Send Documents
- Template Setup
- System Settings

Clicking this option gives the opportunity to add a New Owner, a New Property, a New Holiday Maker, or a New Maintenance Company.

## Adding a New Owner

To add a new owner, click on the button next to the New Owner option, and click the Next button in the bottom right hand corner. This will open a blank New Owner screen for you to enter your details.

The information screens all follow the same format with individual sections that can be navigated by clicking on the relevant tab along the top of the screen. For the New Owner screen these tabs are **General**, **Account Info**, **Maintenance Providers** and **Documentation**. There is also an additional **Overseas** tab, which will only appear if the overseas option is ticked.

The screenshot shows the 'Holiday Manager' software interface for adding a new owner. The window title is 'Holiday Manager' and the subtitle is 'Owner:'. The status is 'LIVE'. The 'General' tab is selected, showing fields for Ref No (Auto), Title (Dr), First Name, Surname, Salutation (<FIRST NAME>), House Name/Number, Address, Town, County, Post Code, and Country. There are also fields for Source, Home Phone, Work Phone, Mobile Number, and three Email fields (Email 1, Email 2, Email 3). Radio buttons allow selecting a preferred number or default email. There are buttons for 'Send SMS', 'Send Email', and 'Send Letter', and an 'Overseas' checkbox. A 'Notes' section has two text areas labeled 'Information' and 'Information 2'. At the bottom, it shows 'Date Added 4/30/2013' and 'Cancel' and 'Save' buttons.

On the general tab, there are standard contact information fields for the owner including a title dropdown, the contents of which can be changed via the system settings. The Salutation will specify to the system how you wish letters and correspondence be addressed for this record.

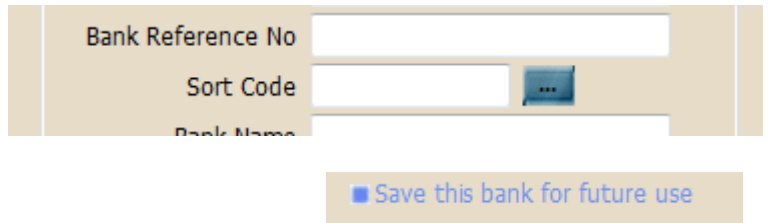
The contact numbers have a selection button to indicate the preferred telephone number for contact, similarly the contact emails section has scope for up to three emails to be stored, with a default selection button to indicate the main email address.

There are two notes fields for the addition of pertinent notes relating to the owner. These notes fields can also be labelled through the System settings if required, to prompt for specific information to be added to one or both fields.

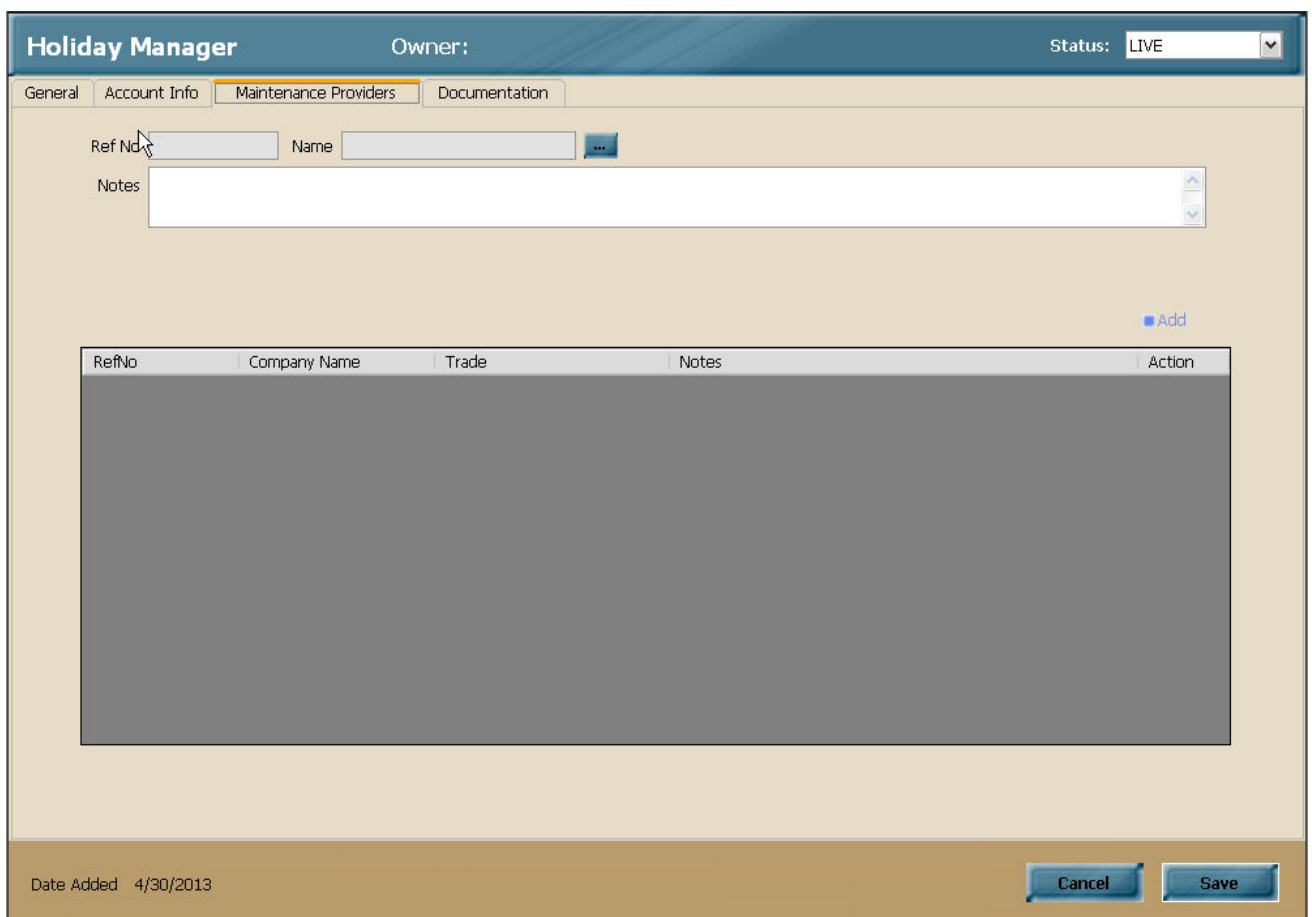
There is also an Overseas tick box, which when selected will indicate this owner is based overseas and unlock an additional overseas tab containing more information.

Included on this screen, is also the option to Send SMS, Send Email and Send Letter. This provides a quick option to send correspondence directly from the information screens.

The second tab, Account Info, allows for the Owner bank information to be stored for payment and reporting functionality. There is a selection box, as indicated with three dots, which will allow you to select a bank from a stored list and save you adding bank details every time. This section can be populated by clicking on the “Save this bank for future use” option at the bottom of the screen once the bank details have been added.



The third tab, Maintenance Providers, allows for the addition of maintenance company information that this owner wishes to use for their property/properties. If Maintenance Companies are stored in this section for the owner, any new properties they add will automatically pick up these details. This will save entering the same information for each and every property.



To select click on the blue selection button next to the record and select the relevant maintenance company from the list. There is also room to store relevant notes/instructions for each maintenance companies, helping to provide guidance to staff when they are booking maintenance work.

See the Adding a new Maintenance Company section of this manual for details on how to add a new Maintenance Company to appear in this list.

The fourth tab is used for storing relevant documentation for this owner. Anything can be stored in here, from paperwork to images, or any other electronic file. The system will purely create a link to the relevant file and will be opened by the appropriate program associated with this file format.

To add a new file, click on the blue locate button and browse to the relevant file you wish to store. Choose a document name that is relevant to the file chosen and click Add Document to add to the grid below.

**When using the network version it is important to ensure the file location is in a network location visible to all users of the system! Failure to do this will mean the links to the file will be incorrect for some system users and they will get an error message saying the file does not exist.**

This is a great solution for scanning correspondence, or saving agreements or documentation that needs to be referred back to. It is basically an electronic version of a filing cabinet for this record.

The final tab is an optional one, used for Overseas owners. As you will see from the screenshot below, the overseas tab is hidden unless the Overseas tick box is checked on the main owners page. When selected, an additional tab will appear along the top of the screen marked Overseas.

Within the overseas section, there is space to store an additional correspondence address, record details of monies you wish to withhold when paying your owner, and a Fico reference if the Owner is tax exempt.

**Holiday Manager** Owner: Status: LIVE

General Account Info Maintenance Providers Documentation **Overseas**

**Overseas Correspondence**

Name   
Address   
  
Town   
County   
Post Code   
Country

**Overseas VAT and TAX**

Overseas Tax   
Overseas Tax (%)

**Ref**

Fico Ref

Date Added 4/30/2013

When you have finished adding all of the information for the owner, click the save button in the bottom right hand corner and the information will be saved for this record.

At this point you will be given the option to add a property for this owner. If you are ready to add a property, click Yes, which will take you straight into the Add New Property screen. Alternatively you can add a new property at a later date and associate with the relevant owner at this point.

### *Adding a New Property*

As with the Add New Owner screen above, the information stored for the property is broken down into a number of Tabs, which can be navigated through via the top menu.

The Tabs available are **General**, **Marketing Information**, **Photographs**, **Maintenance**, **Management**, **Documentation**, **Keys** and **extras**.

Starting with the General Tab, you have the option to add the title of the property, which will be the name used throughout the program to relate to the property. This can be the house name, location or simply what the property is commonly known as. This field is separate from the property address, which will also be stored.

**Holiday Manager** Property Name: \_\_\_\_\_ Status: LIVE

General | Marketing Information | Photographs | Maintenance | Management | Documentation | Keys | Extras

Ref No: Auto

Title: \_\_\_\_\_

Locality: \_\_\_\_\_

Property Name/Number: \_\_\_\_\_

Address: \_\_\_\_\_

Town: \_\_\_\_\_

County: \_\_\_\_\_

Post Code: \_\_\_\_\_

Country: \_\_\_\_\_

Source: \_\_\_\_\_

Phone: \_\_\_\_\_

Commission Rate: 0.00

Booking Charge: 0.00

Owner Ref	Name	% Own	Change	Delete
O2013/0004	jon	100	Change	Delete

[Add Owner](#)

Notes

Notes

Directions

Directions

Date Added: 4/30/2013

Cancel Save

The next field is the locality, which is used to identify a local area where the property is located. If you have a wide spread of properties this may be the town, village or resort where the property is situated, or in other cases a more specific location within your area of coverage.

In addition to these fields, there are also the standard address fields for the property. Do not worry if there are duplicate address information stored here, compared with the Title and Locality information above. These fields are used in different locations and as such should both be completed.

There are two property notes fields, both of which can have the headings changed within the System settings if required. This is useful if you want to store consistent information in one or both of these sections. There is also a third notes field for Directions for the property.

On the right hand side of the screen, there is space to specify the management commission fee relevant to this property. You also have an option to add an additional Booking Charge field. This allows for a booking fee to be made to the owner for each booking taken on this property. This is independent of any booking fee that may be charged to the Guest.

If you have added a property directly from the Owner screen, the owner will be shown in the list box here. To add an owner, or indeed multiple owners, click on the Add Owner option situated immediately below the owner list and select from the list of owners the appropriate one for this property.

The next tab, **Marketing Information**, does exactly what it suggests, by amalgamating all of the marketing information into one section.

The screenshot displays the 'Marketing Information' tab within the 'Holiday Manager' application. The window title is 'Holiday Manager' and the status is 'LIVE'. The 'Marketing Information' tab is selected, showing various input fields and checkboxes. The 'Description' section contains three text areas labeled 'Advertising', 'Marketing', and 'Alternative Marketing'. The 'Date Added' is 4/30/2013. The 'Cancel' and 'Save' buttons are visible at the bottom right.

Field	Type	Value
Property Type	Dropdown	
Sleeps	Spinner	0
No of Beds	Spinner	0
Changeover Day	Dropdown	
Short Breaks	Radio	No
Child Friendly	Checkbox	<input type="checkbox"/>
Pet Friendly	Checkbox	<input type="checkbox"/>
Sea Views	Checkbox	<input type="checkbox"/>
Garden	Checkbox	<input type="checkbox"/>
Swimming Pool	Checkbox	<input type="checkbox"/>
Wi-Fi	Checkbox	<input type="checkbox"/>
Disabled Access	Checkbox	<input type="checkbox"/>
Beach Access	Checkbox	<input type="checkbox"/>
Open Fire	Checkbox	<input type="checkbox"/>
Housekeeping Service	Checkbox	<input type="checkbox"/>
Option 11	Checkbox	<input type="checkbox"/>
Option 12	Checkbox	<input type="checkbox"/>
Heating	Dropdown	
Price Band	Dropdown	
Rating	Spinner	0
Brochure Ref	Text	
Brochure Page Number	Text	
Web address	Text	



To select a Property Type click on the drop down list and select the relevant option for this property. Sleeps refers to the number of guests that the property can accommodate. No. of Beds gives you an alternative search option to the Sleeps option if required. The changeover day is selected from the drop down menu and will dictate the format of booking and availability calendar screen. Short Breaks will tell the system whether the owner will allow short breaks for this property and is simply a Yes or No option.

Moving across to the right hand side of the screen, the heating option for the property is also available on a drop down menu list.

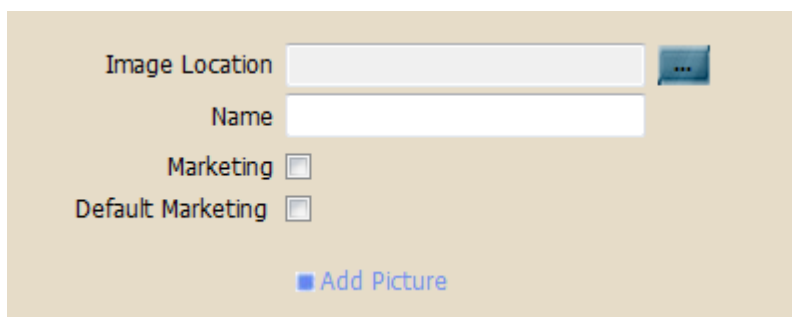
The next option is the price band which again is chosen by clicking on the drop down menu and selecting the relevant price band for this property. The different price bands can be configured and setup via the System Settings option, and is detailed in the accompanying System Settings manual. A View button is located next to the Price Band dropdown menu, this allows you to open a floating window providing you with all of the information on the selected price band.

Following this are options to put in a property rating, a brochure reference and a brochure page number if applicable.

The twelve marketing feature tick boxes across the middle of the screen are completely user definable and are again configured via the relevant section in the System Settings. The 1<sup>st</sup> four of these options are included on the booking and availability screen as a search option. These features enable the common marketing features of the property to be specified for marketing, web and search purposes.

Lastly on this tab are three marketing descriptions boxes. An Advertising, Marketing and Alternative marketing description field allow you to configure slightly different descriptions for different business purposes. This may be website, press advertising etc.

The next tab on the property is for photographs.



The screenshot shows a form for adding a photograph to a property. It includes a text input field for 'Image Location' with a blue search button to its right. Below this is a text input field for 'Name'. There are two checkboxes: 'Marketing' and 'Default Marketing'. At the bottom of the form is a blue button labeled 'Add Picture'.

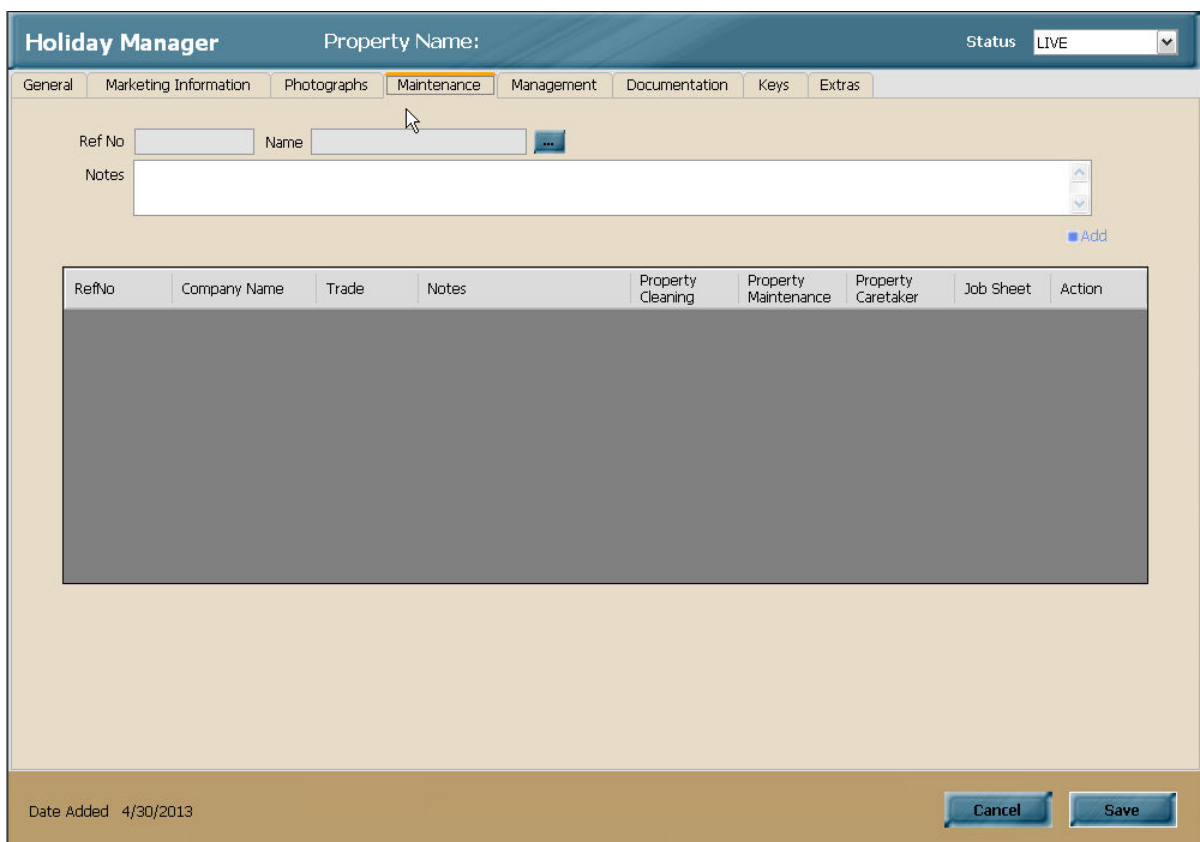
There is no limit to the amount of photographs that can be stored against each property and you have the option of using the photographs for marketing, or simply as a record of condition. The system will also allow for one default marketing image, which will appear as the standard image for this property.

To select an image for the property, click on the blue search button to the right of the image location field and browse for the photograph you wish to assign. Once the image is selected, enter the image name, and choose whether you wish this image to be included for any marketing uploads, and if you want it to be the main image for the property by selecting the default tick box. When you are finished click the Add Picture option to add to the list below.

**Please note, if you are using the network version, it is essential that all photographs are stored in a central location that is accessible for all users of the program. Failure to do this, will bring up warning messages on some computers that the images for this property cannot be found!**

The fourth tab, Maintenance Providers, allows for the addition of maintenance company information that is applicable for this property. If Maintenance Companies have been stored in this section for the owner of this property, they will have been automatically picked up, and the relevant details will be displayed within this screen.

If the owner has not had any maintenance companies already specified, they can be added at this point as per the owner screen, as detailed below.



To select click on the blue selection button next to the record and select the relevant maintenance company from the list. There is also room to store relevant notes/instructions for each maintenance companies, helping to provide guidance to staff when they are booking maintenance work.

Click Add to move the selected maintenance company to the bottom grid. An unlimited number of maintenance companies can be added for each property. Also included is the option to select one maintenance company as the default Cleaning Company and one as the default Property Maintenance for this property. This enables letters and other correspondence to pick up the link to these companies and merge the relevant information as standard. It also allows you to produce reports based on the property and maintenance company links.

The next tab is for the Management details for the property. This has been designed to store pertinent management information such as Utility providers and important reminder dates, such as PAT testing, gas safety certificates, inspections, inventories etc.

There is space for 5 Utility providers and these are selected by 1<sup>st</sup> choosing the relevant provider type, Council Tax, Broadband, Telephone etc. from the drop down list (this list is again configured through the System Settings section).

Click on the blue search button to bring up a list of Maintenance Companies and select the relevant provider.

At the bottom of the screen there are eight user definable dates, with labels that have been configured in the System Settings. By default these are blank, and are activated by clicking on the drop down menu and selecting the relevant date the reminder is due from the calendar.

The reminder can be toggled on and off by clicking on the tick box next to the date as required.

The sixth tab, Documentation, is used for storing relevant documentation for this property. Anything can be stored in here, from paperwork to images, or any other electronic file. The system will purely create a link to the relevant file and will be opened by the appropriate program associated with this file format.

To add a new file, click on the blue locate button and browse to the relevant file you wish to store. Choose a document name that is relevant to the file chosen and click Add Document to add to the grid below.

**When using the network version it is important to ensure the file location is in a network location visible to all users of the system! Failure to do this will mean the links to the file will be incorrect for some system users and they will get an error message saying the file does not exist.**

This is a great solution for scanning correspondence, or saving agreements or documentation that needs to be referred back to. It is basically an electronic version of a filing cabinet for this record.

The penultimate tab, Keys, on the property screen is used to record the key details for this property. There is the option to include a Key Name, Key Number, Description, Status and a Location. Once the relevant information has been completed click Add to move this to the grid below.

The screenshot shows a web interface for adding key details. It features several input fields: 'Key Name', 'Key Number', 'Description', and 'Status' (a dropdown menu). To the right, there are 'Location' and 'Notes' (a text area with scrollbars). Below these fields is a blue 'Add' button. At the bottom, there is a table grid with the following headers: 'Key Name', 'Key Number', 'Description', 'Status', 'Location', and 'Notes'. The table body is currently empty.

This section is used to keep track of the keys you are holding for each property, and as such will be subject to further development plans in due course. This will include many more tracking and reporting options including potential integration with scanning devices and external applications.

The last section for the property is the Extras tab.

Within this section, you have the option to select the extras that are available for this property. To do this, click on the blue search button, and choose the relevant extra you wish to include for this property from the list.

Setting up the extras available on the system is done via the System Settings section, and is fully detailed in the relevant System Settings manual.

Once you have selected your extra, choose the number available for this property and check the remaining details to ensure they are correct for this property. Once you are happy, click Add to move to the grid below. You can select as many extras as you wish for each property and these will appear when a new booking is made. If the Default box is ticked, these will be included automatically on each booking; alternatively these will be optional extras that can be selected when the booking is made.

When you are happy with the information you have added on this, and the rest of the property tabs, click the save button in the bottom right hand corner to save the property to the system.

**Holiday Manager** Property Name: \_\_\_\_\_ Status: LIVE

General Marketing Information Photographs Maintenance Management Documentation Keys **Extras**

**Extra**

Name:  ...

Description:

Set Amount:  Per Night:

Quantity:  Per WK:

Default:  VAT  % of hol Cost:

Exclude from surcharge calculation:

Inclusive of holiday cost:

**Provider**

Owner Commission  Agent

Owner No Commission  Maintenance Provider

H'maker Deposit

Notes:

Name	Desc	Set Amount	Per Night	Per WK	% of Holi fee	Quantity	VAT	Default	Surcharge	Include Rent	Owne Comm

Date Added: 4/30/2013

### *Adding a New Holiday Maker*

Holiday maker information is stored permanently on the system to maintain a full record of holidays that have been booked, and to maintain a marketing list for use in brochure mailing and email marketing campaigns etc.

The holiday maker section is again split into four tabs, with **General**, **Payment**, **Additional Party Members**, and **Documentation**.

The general tab, is used to store all of the relevant contact information, along with other useful information such as car registration, the number of people in the holiday party, any pets, children and the property rating they normally require.

In addition there are three different marketing options, Consent to marketing, Send brochure and Email list. This allows you to specify exactly what marketing is targeted for each holidaymaker.

Lastly on this screen we have the option to add some general notes for the holiday maker.

The next tab, Payment, is used for storing credit card information for the holidaymaker. This allows for the storage of any payment card details and can be configured to calculate any credit card surcharges that are assigned to the holiday costs. Once stored the card information is hidden, and will only be accessible to authorised users.

Multiple card details can be recorded here, by clicking New and entering the relevant information. Once you are happy with the information click on Add to move this information to the grid below.

The third tab, Additional Party Members, is used to store any additional members of the holiday party. The system allows for unlimited additional party members and includes space for their contact details, date of birth and also the same marketing options to allow marketing to take place direct to these people.

Once you have completed the information you require, click Add to save the information to the grid below.

The fourth tab is used for storing relevant documentation for this holiday maker. Anything can be stored in here, from paperwork to images, or any other electronic file. The system will purely create a link to the relevant file and will be opened by the appropriate program associated with this file format.

To add a new file, click on the blue locate button and browse to the relevant file you wish to store. Choose a document name that is relevant to the file chosen and click Add Document to add to the grid below.

**When using the network version it is important to ensure the file location is in a network location visible to all users of the system! Failure to do this will mean the links to the file will be incorrect for some system users and they will get an error message saying the file does not exist.**

This is a great solution for scanning correspondence, or saving agreements or documentation that needs to be referred back to. It is basically an electronic version of a filing cabinet for this record.

Once you are happy you have entered all of the information you require, click on the save button in the bottom right hand corner to save this holiday maker record.

## Adding a New Maintenance Company

The Maintenance Company section is used for storing information about your Maintenance Contractors, Tradesman and Utility Providers.

The Maintenance Company section is again split into three tabs, **General**, **Account Info** and **Documentation**.

The screenshot shows the 'Holiday Manager' application window. The title bar includes 'Company Name:' and 'Status: LIVE'. The 'General' tab is selected, showing a form with the following fields: Ref No (Auto), Company Name, Contact Name, Address, Town, County, Post Code, Country, Email 1, Email 2, and Email 3. There are radio buttons for selecting a default email. On the right, there are fields for Trade, Mobile Number, Contact Number 1, Contact Number 2, and Commission Rate (0.00). Below these are buttons for 'Send SMS', 'Send Mail', and 'Send Letter'. A large text area for 'General Information' is at the bottom. The footer shows 'Date Added 4/30/2013' and 'Cancel' and 'Save' buttons.

The General tab is used to store all of the contact information for the Company, along with a drop down menu to select the relevant Trade or Category for this Company.

There is also an optional Commission Rate box that will allow for the deduction of commission for work carried out by this Maintenance Company. At the bottom of the screen is notes section to allow pertinent information to be stored for this Company.

The second tab, Account Info, allows for the Maintenance bank information to be stored for payment and reporting functionality. There is a selection box, as indicated with three dots, which will allow you to select a bank from a stored list and save you adding bank details every time. This section can be populated by clicking on the “Save this bank for future use” option at the bottom of the screen once the bank details have been added.

The screenshot shows the 'Account Info' tab with the following fields: Bank Reference No, Sort Code, and Bank Name. A selection box with three dots is visible next to the Sort Code field. A button labeled 'Save this bank for future use' is at the bottom.

The final tab on the Maintenance Company section is the Documentation tab.

Anything can be stored in here, from paperwork to images, or any other electronic file. The system will purely create a link to the relevant file and will be opened by the appropriate program associated with this file format.

To add a new file, click on the blue locate button and browse to the relevant file you wish to store. Choose a document name that is relevant to the file chosen and click Add Document to add to the grid below.

**When using the network version it is important to ensure the file location is in a network location visible to all users of the system! Failure to do this will mean the links to the file will be incorrect for some system users and they will get an error message saying the file does not exist.**

This is a great solution for scanning correspondence, or saving agreements or documentation that needs to be referred back to. It is basically an electronic version of a filing cabinet for this record.

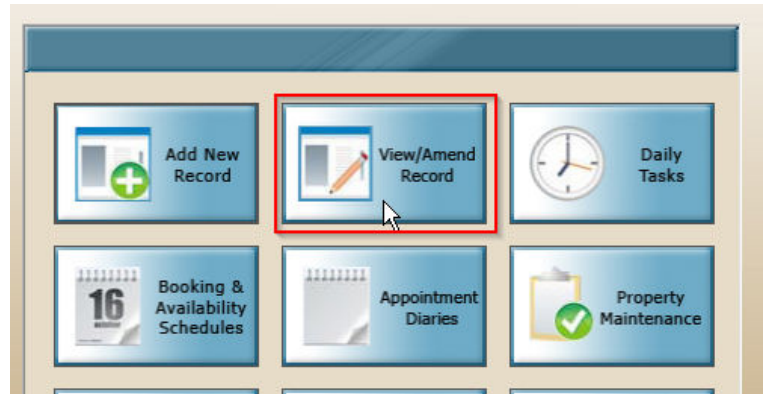
Once you are happy with the information added for the Maintenance Company click on the Save button in the bottom right hand side of the screen to save this record.



## Viewing and Amending Existing Records

The View/Amend Record option is used to view the information screens you have already entered and make amendments as required.

The screens are very similar to the ones covered above when adding a new record, however there are a few minor differences which are detailed below.



### Viewing and Amending an Owner

Starting with the View or Amend Owner option, which is accessible by clicking on the relevant selection button and clicking next to bring up your list of your previously added Owners. Select the record you require by clicking on the blue underlined reference number, which will open up the owner screen.

**Holiday Manager** Owner: Amy Status: LIVE

General Account Info Maintenance Providers Properties History Documentation Transactions

Ref No: O2010/0006  
Title: Ms  
First Name: Amy  
Surname: Shaw  
Salutation: <FIRST NAME>  
House Name/Number: 109  
Address: TENBY ROAD  
Town: Newton Abbot  
County:  
Post Code: EX3 7TR  
Country:

Source:  
Home Phone: 01234 567890  
Work Phone:  
Mobile Number:  
Email 1: someone@yahoo.co.uk  
Email 2:  
Email 3:

Preferred No  
Default

Send SMS Send Email Send Letter  
Overseas

Notes  
Information 1  
Information 2

Date Added 12/1/2010 4:56 PM

Add New Close Save

There are a few key differences compared to adding a new owner. The owner salutation is now shown on the top blue section of the screen, the status of the record is also shown within the same blue section to display whether this is a live or archived record.

The reference number for this owner is now displayed on the General information, and there are three new tabs across the top of the screen. **Properties**, **History** and **Transactions** are now included on the owner record.

The properties tab will display all properties linked to this owner, with the % they own of each property.

Property RefNo	Property Name	( % )Own
<u>P2010/0001</u>	The Lodge	100.00

The History tab will provide a full history of the events that have happened with this owner, starting from when the owner was added to the system.

General	Account Info	Maintenance Providers	Properties	History	Documentation	Transactions
Event of	Event Type	Event By	Event Time	Description		
	Owner Added	ian	01/12/2010	New owner created: Paul		

The last new tab is the Transactions tab, which will detail any accounts transactions related to this Owner.

Date	Event By	Description	Transaction Ref	Credit	Debit

If you make any changes to any of the owner record fields, simply click on the Save button. The system will prompt you to save if you try and close the record after amendments have been made.

### *Viewing and Amending a Property*

To open a property screen for viewing, click on the view or amend property selection button and click next to bring up your list of your previously added Properties. Select the record you require by clicking on the blue underlined reference number, which will open up the property screen.

As per the Owner screen, whilst the majority of the screens remain the same as the Add New Property Record, there are a few differences which have been detailed below.

The Property Name is now shown on the top blue section of the screen, the status of the record is also shown within the same blue section to display whether this is a live or archived record.

There are two additional tabs displayed across the top of the screen containing the History and Transaction details for the Property.

There are also two additional blue buttons at the bottom of the screen, to allow you to view the booking scheduler for this property, and to add a New Holiday Maker for the purpose of booking a holiday.

The screenshot shows the 'Holiday Manager' interface for a property named 'The Lodge'. The status is 'LIVE'. The interface includes several tabs: General, Marketing Information, Photographs, Maintenance, Management, Documentation, Keys, Transactions, History, and Extras. The 'General' tab is active, displaying various fields for property details. The 'Notes' and 'Directions' sections are also visible. At the bottom, there are buttons for 'Add New', 'View Booking Schedule', 'Close', and 'Save'. The date added is 12/1/2010.

Owner Ref	Owner Name	% Own
<a href="#">O2010/0001</a>	Paul	100.00

To view the booking scheduler for this property click on the View Booking Schedule button. You will see the calendar for this property, fully complete with any holidays that have already been booked out. Moving the mouse over any week on the scheduler will display the appropriate weekly charge for this property and week. Moving the mouse over a booked week will provide a brief booking summary and status for the booking. Full details of the booking and availability functionality are detailed in the relevant Booking and Availability manual.

Running through the other new tabs, the Transactions tab, as per the Owner screen, provides full information of any accounts transactions that have taken place for this property. This also contains links to take you to the relevant transaction screens, as depicted on the screenshot below by the blue underlined Transaction Ref link.

Date	Event By	Transaction Ref	Credit	Debit
27/10/2011	ian	<a href="#">REC00049</a>	595.98	0.00
27/10/2011	ian	<a href="#">INV00141</a>	0.00	595.98
24/10/2011	ian	<a href="#">INV00139</a>	0.00	560.70
11/10/2011	ian	<a href="#">REC00046</a>	265.50	0.00
07/10/2011	ian	<a href="#">INV00116</a>	0.00	120.00
05/10/2011	ian	<a href="#">REC00041</a>	409.80	0.00
05/10/2011	ian	<a href="#">REC00040</a>	534.00	0.00

The second new tab is the History tab. Again as per the owner screen this provides you with a breakdown of the history of this property record. Slightly differently to the Owner screen, this contains three separate sections. One displays the booking history for the property; one provides details of when the property has been marked out as unavailable, and the third displays the traditional history of events that have happened for the Property record, starting with the addition of this property as a new record.

**Holiday Manager**
Property Name: The Lodge
Status: LIVE

General
Marketing Information
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**Booking History**

Ref No	Holiday Maker Ref No	Booking From	Booking To	Booking Status
<a href="#">B2011/0006</a>	H2011/0001	26/03/2011	02/04/2011	Provisional Boo...
<a href="#">B2011/0011</a>	H2010/0002	23/04/2011	30/04/2011	Deposit Receiv...
<a href="#">B2011/0012</a>	H2011/0001	16/04/2011	23/04/2011	Full Paid
<a href="#">B2011/0013</a>	H2010/0001	07/05/2011	14/05/2011	Deposit Receiv...
<a href="#">B2011/0014</a>	H2010/0001	26/05/2011	04/06/2011	Cancelled
<a href="#">B2011/0020</a>	H2010/0001	25/06/2011	02/07/2011	Deposit Receiv...
<a href="#">B2011/0021</a>	H2011/0001	27/08/2011	03/09/2011	Provisional Boo...
<a href="#">B2011/0022</a>	H2010/0001	09/04/2011	16/04/2011	Provisional Boo...

**Unavailable History**

From	To	Status
02/04/2011	09/04/2011	Active
16/07/2011	23/07/2011	Active
16/07/2011	23/07/2011	cancelled
27/04/2013	04/05/2013	True
18/05/2013	25/05/2013	True

**Property History**

Event of	Event Type	Event By	Event Time	Description
<a href="#">I2013/0005</a>	Task	tom	30/04/2013 02:42 PM	check booking
	Cancelled booking	tom	30/04/2013 02:42 PM	New holiday booking
	Change of booking status	tom	30/04/2013 02:39 PM	Booking Cancellation
	Change of booking status	tom	30/04/2013 02:39 PM	Change to Cancelled
	Change of booking status	tom	30/04/2013 02:39 PM	Change to Deposit Received
<a href="#">REC00051</a>		tom	30/04/2013 02:39 PM	Monies received in
	Cancelled booking	tom	30/04/2013 02:36 PM	New holiday booking
	Change of booking status	tom	30/04/2013 02:35 PM	Booking Cancellation
	Change of booking status	tom	30/04/2013 02:35 PM	Change to Cancelled

Date Added 12/1/2010

Add New
View Booking Schedule
Close
Save

If you have made any changes to this Property record, click on the Save button, otherwise click Close to shut down this Property without saving.

## Viewing and Amending Holidaymaker

To open a Holidaymaker screen for viewing, click on the view or amend Holidaymaker selection button and click next to bring up your list of your previously added Holidaymakers. Select the record you require by clicking on the blue underlined reference number, which will open up the relevant screen.

As per the Owner and property records, whilst the majority of the screens remain the same as the Add New Holidaymaker Record, there are a few differences which have been detailed below.

There are two additional Holidaymaker tabs, **History** and **Transactions**, along with a few changes to the **General** Holidaymaker screen.

The Holidaymaker salutation is displayed on the top blue panel of the screen, along with the holidaymaker status. The Holidaymaker reference number is now displayed above the Title and there is now a Book Holiday button available in the bottom right hand corner.

Clicking this will take you through to the Booking & Availability section, showing all of the properties available. From here, you can narrow down your search by date or marketing feature, before viewing the selected properties in the calendar view. Full details of this functionality are available in the Booking and Availability manual.

The screenshot displays the 'Holiday Manager' software interface. At the top, the title bar reads 'Holiday Manager' and 'Holiday Maker: John', with a status dropdown set to 'LIVE'. Below this is a navigation menu with tabs for 'General', 'Payment', 'Additional Party Members', 'Documentation', 'History', and 'Transactions'. The 'General' tab is active, showing a form with the following fields:

- Ref No: H2010/0001
- Title: Mr
- First Name: John
- Surname: Sampson
- Salutation: <FIRST NAME>
- House Name/number: 12
- Address: GREENRIDGE GARDENS
- Town: Swindon
- Country: [empty]
- Post Code: OX9 4EK
- Country: [empty]
- Date of Birth: 30/04/2013
- Age: [empty]
- Car Reg: [empty]
- Company Name: [empty]
- Enquiry Source: Website
- Day Telephone: [empty]
- Evening Telephone: [empty]
- Mobile Number 1: 0123456789
- Mobile Number 2: [empty]
- Email 1: someone@yahoo.co.uk (selected as Default)
- Email 2: [empty]
- Email 3: [empty]
- No In Party: 6
- Pets: 0
- Children: 0
- Rating: 0
- Consent Marketing: [checked]
- Send Brochure: [checked]
- Email List: [checked]

At the bottom of the form, there are three buttons: 'Add New', 'Book Holiday', and 'Close', followed by a 'Save' button. The footer of the interface shows 'Date Added: 12/6/2010 2:46 PM'.

The History tab for the Holidaymaker is again broken into three sections, showing the Booking Information, Cancelled Bookings and the standard history for the relevant holidaymaker.

**Holiday Manager** Holiday Maker: John Status: LIVE

General Payment Additional Party Members Documentation **History** Transactions

**Booking Information**

Ref No	Property Name	From	To
<a href="#">B2010/0002</a>	Rock Cottage	24/07/2011	31/07/2011
<a href="#">B2010/0005</a>	Riverview	19/02/2011	26/02/2011
<a href="#">B2010/0006</a>	Towan Apartm...	25/02/2011	04/03/2011
<a href="#">B2010/0008</a>	Eco Retreat	08/01/2011	15/01/2011
<a href="#">B2011/0002</a>	Corner Lodge	05/03/2011	12/03/2011
<a href="#">B2011/0003</a>	Rock Cottage	23/01/2011	30/01/2011
<a href="#">B2011/0004</a>	Rock Cottage	06/03/2011	13/03/2011
<a href="#">B2011/0013</a>	The Lodge	07/05/2011	14/05/2011

**Booking Cancelled Information**

Ref No	From	To
<a href="#">B2011/0014</a>	28/05/2011	04/06/2011
<a href="#">B2013/0005</a>	01/06/2013	08/06/2013
<a href="#">B2013/0006</a>	01/06/2013	08/06/2013
<a href="#">B2013/0007</a>	09/06/2013	16/06/2013

**Holidaymaker History**

Event of	Event Type	Event By	Event Time	Description
<a href="#">T2013/0005</a>	Task	tom	4/30/2013 2:42 PM	check booking
		tom	4/30/2013 2:42 PM	New holiday booking
	Cancelled booking	tom	4/30/2013 2:39 PM	Booking Cancellation
	Change of bookin...	tom	4/30/2013 2:39 PM	Change to Cancelled
	Change of bookin...	tom	4/30/2013 2:39 PM	Change to Deposit Received
<a href="#">REC00051</a>		tom	4/30/2013 2:39 PM	Monies received in
		tom	4/30/2013 2:36 PM	New holiday booking
	Cancelled booking	tom	4/30/2013 2:35 PM	Booking Cancellation
	Change of bookin...	tom	4/30/2013 2:35 PM	Change to Cancelled
	Change of bookin...	tom	4/30/2013 2:34 PM	Change to Deposit Received

Date Added: 12/6/2010 2:46 PM

Add New Book Holiday Close Save

The other new tab, **Transactions**, provides you with full accounts information for this holidaymaker. It also allows you to view account documentation by clicking on the relevant blue underlined Transaction Ref. link.

Full details of the accounts functionality are available in the relevant Accounts Manual.

General Payment History **Transactions** Additional Party Members Documentation

Date	Event By	Description	Transaction Ref	Credit	Debit
<a href="#">06/12/2010</a>	ian	Booking From 07/24/20...	<a href="#">INV00002</a>	0.00	928.00
<a href="#">06/12/2010</a>	ian	Deposit Money	<a href="#">INV00002</a>	0.00	150.00
<a href="#">10/01/2011</a>	ian	Deposit Money	<a href="#">INV00009</a>	0.00	125.00
<a href="#">10/01/2011</a>	ian	Booking From 20/03/11...	<a href="#">INV00010</a>	0.00	420.86

If you have made any changes to this Holidaymaker record, click on the Save button, otherwise click Close to shut down without saving.

## Viewing and Amending a Maintenance Company

To open a Maintenance Company record for viewing, click on the view or amend Maintenance Company selection button and click next to bring up your list of your previously added Maintenance Companies.

**Holiday Manager** Company Name: claire's cleaners Status: LIVE

General Account Info History Documentation Transactions

Ref No: M2013/0001

Company Name: claire's cleaners Trade: Cleaner

Contact Name: Claire Jones Mobile Number: 0789456123

Address: 35 Contact Number 1: 0789456123

Oldborn Close Contact Number 2:

Town: Newquay Commission Rate: 2.00

County: Cornwall

Post Code: Ca2 3Cf

Country: Uk

Email 1: tom.smith@hls-solutions.com

Email 2: Default

Email 3:

Send SMS Send Mail Send Letter

General Information

Date Added: 4/26/2013 2:09 PM

Add New Close Save

Select the record you require by clicking on the blue underlined reference number, which will open up the relevant record.

As per the other information records, whilst the majority of the screens remain the same as the Add New Maintenance Company Record, there are a few differences which have been detailed below.

There are two additional Maintenance Company tabs, **History** and **Transactions**, along with a few changes to the **General** screen.

The Maintenance Company name is now displayed on the top blue panel of the screen, along with the status, and the reference number is now displayed above the Company Name.

The History tab will provide a full history of the events that have happened with this owner, starting from when the owner was added to the system.

Event of	Event Type	Event By	Event Time	Description
	Maintenance P...	tom	26/04/2013 02:09 PM	New maintenance provider created: claire's cleaners

The last new tab is the Transactions tab, which will detail any accounts transactions related to this Owner.

Date	Event By	Description	Transaction Ref	Credit	Debit
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If you make any changes to the Maintenance Company record, simply click on the Save button, or the system will prompt you to save if you try and close the record when amendments have been made.

## Summary

This manual should take you through all of the steps required to add new records to your system, plus view and amend existing records that have already been added.

If you have any queries with any of these steps, please do not hesitate to contact a member of our support team via [support@hls-solutions.com](mailto:support@hls-solutions.com), and they will be happy to assist.

Additional manuals covering further aspects of the program can be obtained from the support team, if you do not already have access to these.