HLS Holiday Manager HelpSheet

System Events

*Last Updated: 24th April 2013*

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Introduction

The system events functionality has been designed to automatically produce any number and configuration of letters, tasks, or SMS text messages when certain business critical events take place within the system. There is no limit to the amounts of letters or SMS messages that can be generated for each system event, and these can be sent to multiple recipients to inform them of the situation.

No more producing individual letters for your owner, guest, cleaner, caretaker and property manager all can be produced automatically by simply using the system!

The information below will take you through the System Events options with explanations of what these are for, and how they influence the program.

System Events Setup

The system events allow you to specify automated actions that are triggered when key business critical events take place.
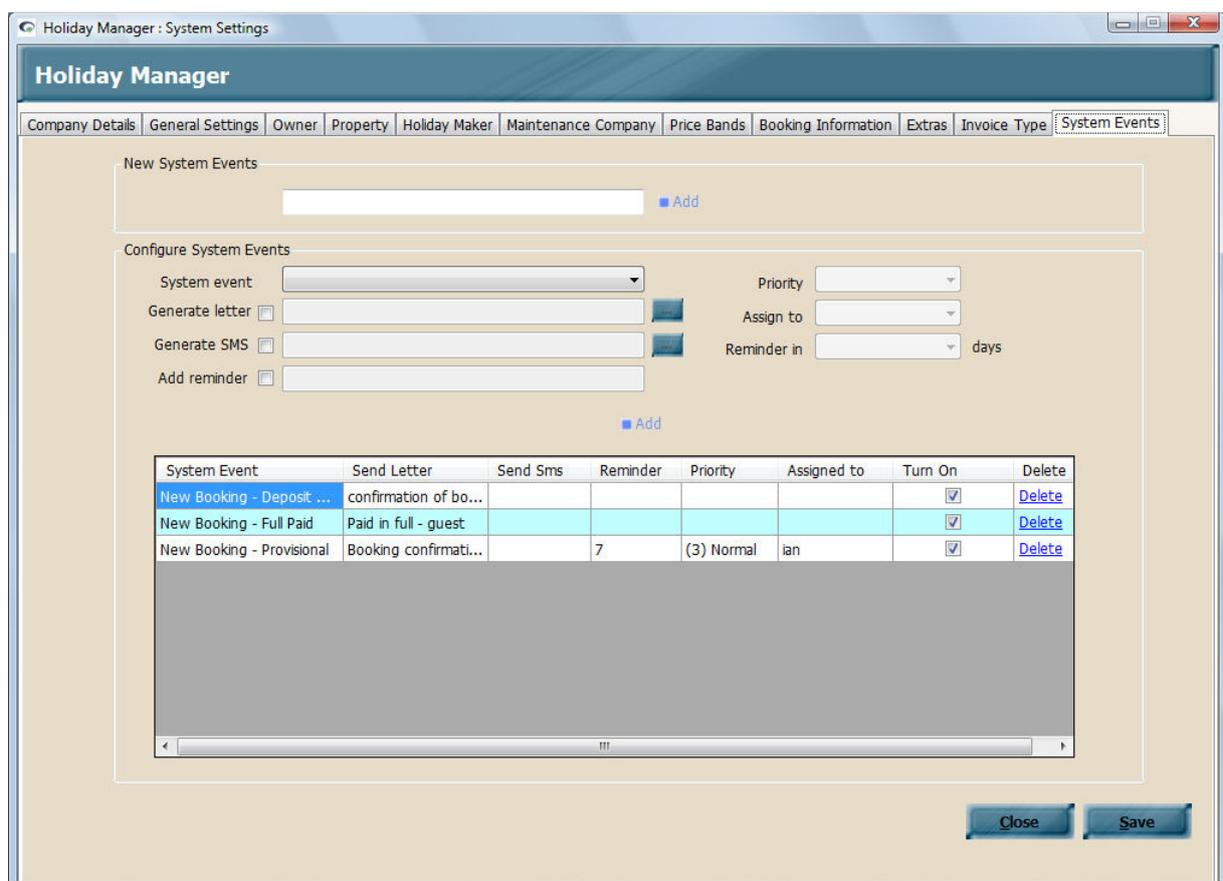
A number of the most common system events are available by default on the system and appear on the System Event dropdown menu. In addition, you have the option to add an unlimited number of additional events that you may wish to use within the system.

New System Events

To add a new system event to the menu below, simply type in the new event name and click on the Add button. The event will now move to the lower System Event dropdown menu.

Configure System Events

Clicking on the System event drop down will provide you with a list of the events available within the software.

Click on the event you would like to setup automated actions, and then choose the automated event(s) you wish to happen at this point.

The options are "Generate letter", "Generate SMS" and "Add reminder".

Clicking on the "Generate letter" option will allow you to click on the drop down list and select the document(s) you wish to produce for this system event.

As above, clicking on the "Generate SMS" option will allow you to click on the drop down list and select the default SMS text message that you wish to send on this system event trigger.

If you choose the "Add reminder" option, you will also need to select the reminder name, the number of days after the system event the reminder is triggered, the priority and who the task is to be assigned to.

Clicking on "Add" will move the configuration you have selected to the grid below, where it can be viewed and removed as required.

By default as each event is configured they will be turned on by default. You do however have the option to manually Turn on/off individual events if required.

System Events Practical Example

This section will show you how the system events are useful in the Holiday Manager software using an example based on the booking system.

Once a booking has been completed and the "Close" Button is clicked. You will be prompted with the following screen:
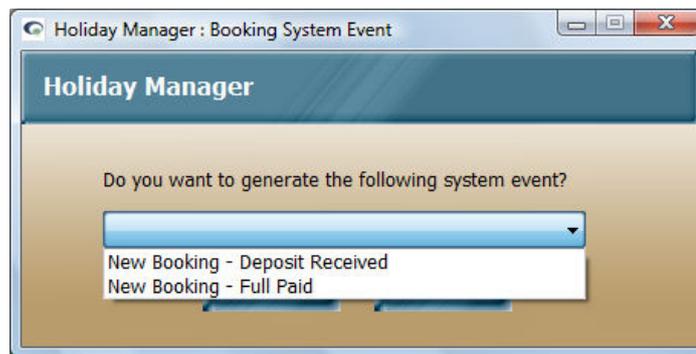

The options in the drop down menu will vary based on what you have setup in the System Settings. In this instance I have selected "New Booking – Deposit Received".

Now when you return to the Holiday Manager home screen you will notice a red star on the "Print/Send Documents" Tab. This indicated that there are generated letters/emails that are awaiting action. In this case the system has added the letter attached to the "Deposit Received" system event into the queue in the "print/send documents" area. I will also have linked with the relevant contacts and automatically merged all of the required information into the letter.
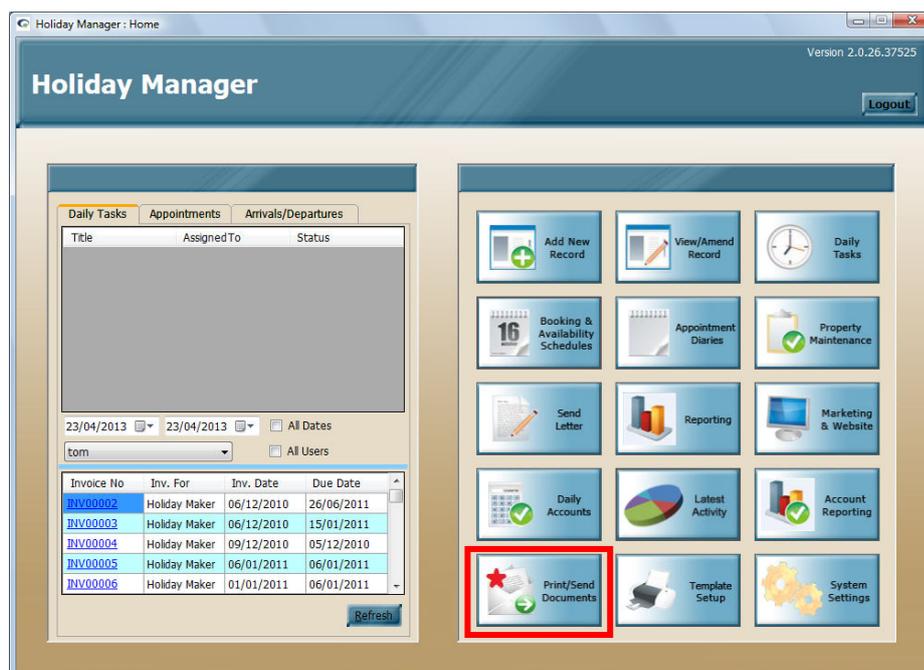
Once "Print/Send Documents" is clicked you will see the following:
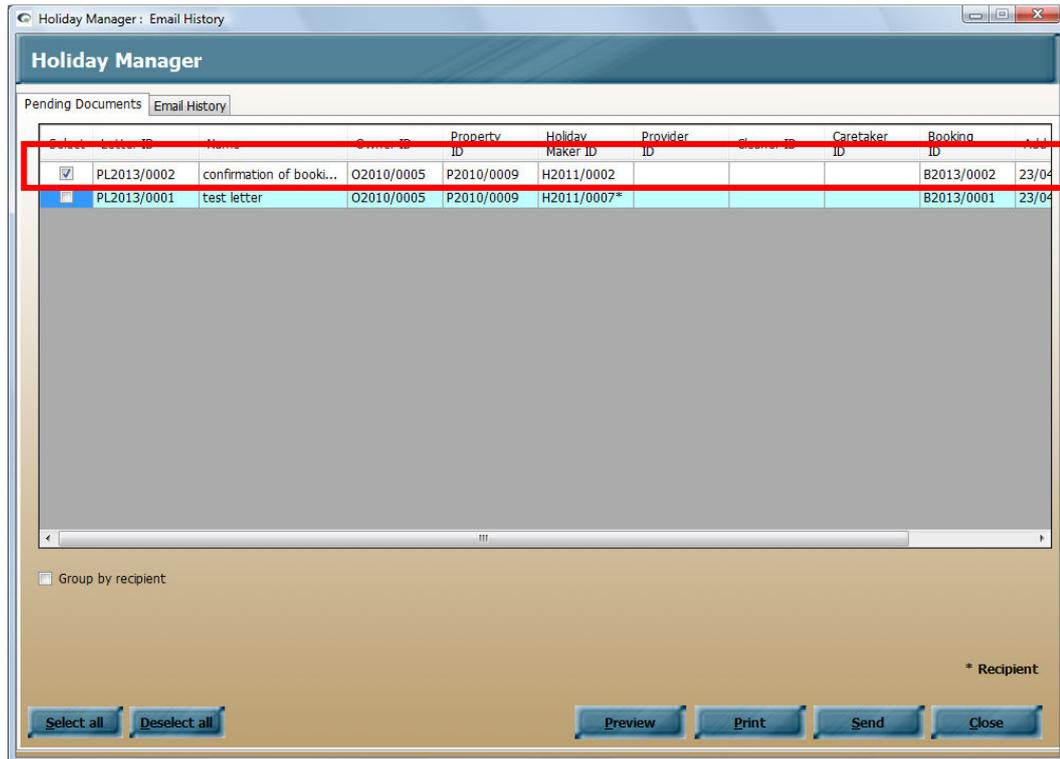
We now have our conformation of the deposit being paid ready to be emailed, or sent out to the holidaymaker. The Letter will already contain all of the merged information, which can be checked by clicking on "Preview"