

HLS Holiday Manager HelpSheet

System Events

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website and design solutions for the holiday letting industry

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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.

oliday M	lanager								
npany Details	General Settings Owner P	roperty Holiday Make	r Maintenanc	e Company	Price Bands B	ooking Informatio	n Extras Inv	oice Type Sy	stem Events
Ne	w System Events								
					6 d d				
				•	Muu				
Cor	nfigure System Events								
	System event			-	Pr	iority	+		
	Generate letter 📄				Assig	n to	-		
	Generate SMS 📃				Remind	ler in	→ d	ays	
	Add reminder			1					
				🔳 Add					
	System Event	Send Letter	Send Sms	Reminder	Priority	Assigned to	Turn On	Delete	
	System Event New Booking - Deposit	Send Letter confirmation of bo	Send Sms	Reminder	Priority	Assigned to	Turn On	Delete <u>Delete</u>	
	System Event New Booking - Deposit New Booking - Full Paid	Send Letter confirmation of bo Paid in full - guest	Send Sms	Reminder	Priority	Assigned to	Turn On	Delete Delete Delete	
	System Event New Booking - Deposit New Booking - Full Paid New Booking - Provisional	Send Letter confirmation of bo Paid in full - guest Booking confirmati	Send Sms	Reminder 7	Priority (3) Normal	Assigned to	Turn On	Delete Delete Delete Delete	
	System Event New Booking - Deposit New Booking - Full Paid New Booking - Provisional	Send Letter confirmation of bo Paid in full - guest Booking confirmati	Send Sms	Reminder 7	Priority (3) Normal	Assigned to	Turn On V V	Delete Delete Delete Delete	
	System Event New Booking - Deposit New Booking - Full Paid New Booking - Provisional	Send Letter confirmation of bo Paid in full - guest Booking confirmati	Send Sms	Reminder 7	Priority (3) Normal	Assigned to	Turn On V V	Delete Delete Delete Delete	
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	System Event New Booking - Deposit New Booking - Full Paid New Booking - Provisional	Send Letter confirmation of bo Paid in full - guest Booking confirmati	Send Sms	Reminder 7	Priority (3) Normal	Assigned to	Turn On V	Delete Delete Delete Delete	
	System Event New Booking - Deposit New Booking - Full Paid New Booking - Provisional	Send Letter confirmation of bo Paid in full - guest Booking confirmati	Send Sms	Reminder 7	Priority (3) Normal	Assigned to	Turn On	Delete Delete Delete	
	System Event New Booking - Deposit New Booking - Full Paid New Booking - Provisional	Send Letter confirmation of bo Paid in full - guest Booking confirmati	Send Sms	Reminder 7 7	Priority (3) Normal	Assigned to	Turn On	Delete Delete Delete	

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:

Ho	day Manager
	Do you want to generate the following system event?
	New Booking - Deposit Received

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.

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				_				
Daily Tasks	Appointments	Arrivals/D	epartures					
Title	Assigne	dTo	Status		Add Re	l New cord	View/Amend Record	Daily Tasks
					16 Bool Avail Sche	king & IIII lability adules	Appointment Diaries	Property Maintenance
23/04/2013 tom	23/04/201	3 🗣 🗖 Al	I Dates I Users			iend etter	Reporting	Marketing & Website
Invoice No	Inv. For	Inv. Date	Due Date		in the second se			
INV00002	Holiday Maker	06/12/2010	26/06/2011			Daily	Latest	Account
INV00003	Holiday Maker	06/12/2010	15/01/2011			counts	Activity	Reporting
INV00004	Holiday Maker	09/12/2010	05/12/2010					
INV00005	Holiday Maker	06/01/2011	06/01/2011		1			
<u>INV00006</u>	Holiday Maker	01/01/2011	06/01/2011	+	Prin	t/Send uments	Template	System Settings
			Refr	esh				

Once "Print/Send Documents" is clicked you will see the following:

	Email	HISCOTY		Property	Holiday	Provider		Caretaker	Booking	
	1 1010-10		0	ID	Maker ID	ID	0.000	ID	ID	
V	PL2013/0002	confirmation of booki	02010/0005	P2010/0009	H2011/0002				B2013/0002	1
1				m]	

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"

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L	-2 + (-1) + (-2) + (-1) + (-2) +	*
	Confirmation of Booking ? Deposit Paid	E
-	Thank you for booking a Perfect Stay at Primrose Farm.	
. 3 2	Booking reference: B2013/0002 Check In: From 4.30pm - <u>Sunday 14 July</u> 2013 Depart: By 10.00am - <u>Sunday 21 July</u> 2013 Deposit Paid: 0.00	
5 4	You should very shortly receive by email an automated receipt from our booking system confirming the payment that you have made today. This letter is final confirmation of your booking so please read the following very carefully.	
9	Accessing the Property	
8	You will either be met at Primose Farm by a representative of the property owner or given the details of the key safe location, degending on your arrival times. This meeting will be agreed either prior by your arrival day or on the arrival day itself. Please remember that the property will not be ready until 4:30pm unless there is a reason why it will be ready any earlier.	
10 - 9	Essential Contact The local management for Primrose Farm is a company called #m_coname and their contact telephone number is #m_tel1. Should you have any problems during your stay, please contact them immediately. If for any reason, you cannot get hold of them then please call us on 0845 388 8635 as	*
F	we are accessible 44 nours a day for any emergencies.	9
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