

HLS Solutions Ltd Update Notes

Version 2.0.17

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Summary

Below you will find brief information on the changes that have been introduced for the latest release of the software, version **2.0.17**.

This version has been released as part of a scheduled release based on feedback from current system users. We have also looked to continue the work from the recent releases by adding additional functionality and features to the system events, automated letters and email aspects of the program.

The main features included in this version are:

- Sending Letters via Email
- Print Send Documents section
- Daily Tasks
- System Events
- Generating a letter from a booking
- Additional System Event
- System Event Prompts
- Manual System Events
- Additional Booking Merge Codes

Sending Letters via Email

As part of the recent enhancements to the automated letters and the sending of letters via email, we have added some increased functionality.

When generating a letter that you want to send via email, you now have the option to specify whether this letter is to be sent as a .pdf attachment, or you wish the letter to be merged into the actual email message.

Holiday Manage	r: Send Letter
Holiday M	anager
Header Image	No Header Image
Body Image	○ No Body ● Perfect Stays ▼ Pages Page 1 ▼
Letter Name	Paid in full - guest Letter ID CL2011/0009
То	Ms Zoe Baker Booking
Letter For	Holidaymaker
	B I □ E E = Calibri • 3 • A •
Letter Body	Dear #h_firstname Confirmation of Booking – Paid in Full Thank you for paying your final balance and cautionary deposit for your forthcoming stay at #p_no #p_add1, #p_town, #p_county. This letter is final confirmation of your booking so please read the following very carefully and print it off and bring it with you. Booking Reference: #b_id Check In: From 4.30pm - #b_fromdate Payment Totals: f #h totaldue Denart by: By 10:00am = #h todate
	······································
Footer Image	
Send Options	Attachment Email
	Queue <u>Close</u> <u>Save</u> <u>Preview</u> <u>Print</u> <u>Send</u>

When you click on the "Send" button a new screen has been introduced to allow you to check the email before you send it, plus make any changes you wish. You can also include any other attachments, your email footer or carry out any other amendments or additions to the email content before sending.

A further addition to the email form is the "Receive Copy" tick box. Selecting this will automatically populate the CC with the email address of the logged in user, so that you receive a copy of the emails you are sending out.

G Holiday M	anager : Send Email		
Holiday	Manager		
То	Ms Zoe Baker		
CC		Receive Copy	
Attach File	Paid in full - quest	Attach a file	
Accochine			
Message			
Footer			
		Close	end

Once the email has been sent, you will notice there is now a timer box, to let you know the email is being processed.

Holiday Manager		
Sending mail		
	14114 1 14	

Print Send Documents section

The Print Send documents section is used to store all documentation that has been produced by the automated system events, along with any manual documentation you have queued for delivery.

As part of the recent changes to the automated events, we have carried out some additional enhancements to this section to make it more powerful than ever to send individual and groups of documents out to your clients.

The main changes to this section include the recipient indicator, and the option to group by recipient.

Holiday Manager : Email History										
loliday Manager										
	Email Histo	блу								
Select		Letter ID	Name	Owner ID	Property ID	Holidaymaker ID	Maintenance ID	Booking ID	Add Date	Delete
		PL2011/0022	Paid in full		P2010/0004	H2011/0001		B2011/0053*	03/10/2011	Remove
		PL2011/0023	new bookin		P2010/0004	H2010/0002		B2011/0054*	03/10/2011	Remove
		PL2011/0024	new bookin		P2010/0004	H2010/0002		B2011/0055*	03/10/2011	Remove
		PL2011/0025	Paid in full		P2010/0004	H2010/0002		B2011/0056*	03/10/2011	<u>Remove</u>
		PL2011/0028	new bookin		P2010/0003	H2010/0002		B2011/0058*	03/10/2011	Remove
		PL2011/0029	Paid in full		P2010/0003	H2010/0002		B2011/0058*	03/10/2011	Remove
		PL2011/0030	owner - ne		P2010/0003	H2010/0002		B2011/0060*	03/10/2011	Remove
		PL2011/0031	Paid in full		P2010/0003	H2010/0002		B2011/0060*	03/10/2011	Remove
		PE 2011/0001	XCXV			H2011/0001*			03/10/2011	Remove
Group by re	cipient									
										* Recipier
Select all	Deselect all	í			1	Preview	Print	Se Se	end	Close
							1000			

This allows you to group all of your letters/emails to one recipient into one email, rather than send out multiple emails and attachments. We also have included the option to specify how these are being sent.

9	Holiday Manager : Email Selection		
	Letter Name	As Attachment	Merged to Email
	owner - new booking merge c		
	Paid in full - guest		
		6	Next Close

This allows you to send receipts, invoices, statements and other accounts documentation, along with covering letters/emails that have been generated by the automated system events.

Daily Tasks

A useful addition, and time saving feature, is the option now available from the Daily Tasks. Instead of having to come out of this section to generate letters for a reminder, we can simply click on the "Sent Letter" link by each linked record to create a letter or email for this record.

Holiday Manager	
Task ID T2011/0138	
Title Have we received o	eposit
Assigned To ian	
Status Not Started	
Priority (3) Normal	
Due Date 🔽 10/10/2011	
Completed (%)	
Work For Select/Change	
Work for link Mr Gerald Weston	H2011/0001 (Remove) Send Letter
Eco Retreat P20	0/0004 (Remove) Send Letter
Booking <u>B2011/(</u>	052 (Remove) <u>Send Letter</u>
D	
Description	
	×
	*
	and a second second
	<u>Cancel</u> Save

This offers the facility to send letters/emails direct from this screen, and make the relevant notes on the daily tasks for further chasing as required.

System Events

When setting up your automated system events, we have now created an additional field for the reminder option. This allows you to specify a personalised reminder name for each system event, rather than have the default one supplied by the system.

Holiday Manager	: System Settings							_ - X
Holiday Md								Í
попиау ма	anager							
Company Details G	General Settings Ov	wner Property Holid	ay Maker Maintenand	ce Company Price	Bands Booking Info	ormation Extras Inv	voice Type Sys	tem Events
New	System Events							
				- Add				
Confi	igure System Events	;						
	System event			-	Priority			
G	Generate letter 📄				Assign to	~		
	Generate SMS 🔲				Reminder in		lays	
	Add reminder 🔲							
				- 444				
				Add				
	SystemEvent	SendLetter	SendSms	Reminder	Priority	Assignedto	Delete	
	New Booking	Paid in full - guest		1	(1) High	ian	<u>Delete</u>	
	New Booking - F	owner - new boo		5	(2) Low	ian	Delete	
	New Booking	new booking mer		7	(3) Normal	ian	Delete	
	New booking fo	new booking mer					Delete	
	New Booking St	owner - new boo					Delete	
	1							
L L	ч. U.							
						1	Close	Save
	New Booking New Booking - F New Booking New booking fo New Booking St	Paid in full - guest owner - new boo new booking mer new booking mer owner - new boo		IIII	(1) High (2) Low (3) Normal	ian ian	Delete Delete Delete Delete Delete Close	Save

Generating a letter from a booking

Similar to the Daily Tasks section above, we have introduced a new time saving feature on all of the booking records.

Now included in the bottom left hand corner is the option to "Send Letter". This allows you to send correspondence to the owner, holidaymaker or linked maintenance company, without having to go into the dedicated "Send Letter" screen.

💽 Holiday Mana	ager : Booking View/Edit											×
Holiday	Manager								Status	Full Pa	id	*
Dealing Info	Pacifica Comment	De alvia a Uiat					_		-	_	_	
BOOKING INFO	Booking Summary	BOOKING HISt	ory									
Booking					Property							
Booking Ref	f No B2011/0059				Ref No	P2010	0/0003		Title Ro	ock Cotta	ge	
Booking Fro	m 13/11/2011 -	Booking To	20/11/2011 - Nights	7								*
		Holiday Cost	339.00		Notes							
Holiday Make	ar											
Rof No.	H2010/0002		Source Newspaper Adv	erti 🚽	Extra							
Name	Ms Zoe Baker				Extra's a	/ailable		1				
- Marrie	123 PARK ROAD, , Glasgow	v - G29 6GT, ,			Name		Desc	Price	Include	Num Avail	Num Reg	Total
Address					Deposit		Refundable reservati	100.00	V	1.00	1.00	100.00
Talaakaaa				-	Small ham	per	Welcome Hamper			1.00		
Telephone	iwoollov@vzboo.co.uk	_	Car Bog T56 W/ET		Dog		Pet Surcharge			5.00		
E-mail	jwoolley@yarloo.co.uk		Carkey 150 WEI		Large Ham	per	Welcome Hamper			1.00		
Party					Booking C	harge	Booking charge	20.00	V	1.00	1.00	20.00
Total in Par	rty 3 Adul	ts 2										
	Childre	en 1										
	Infan	ts 0	Guest Informat	tion								
Notes					•		III					Þ
NUCES												
									Tot	al Extra		120.00
									100			120.00
				-								
-					-	-			-			
Send Le	Add Notes	Cancel	Booking <u>R</u> eceive M	onies	Send M	ail) 🔎	Preview	Next		Close		Book

Additional System Event

As part of the automated system event work we have been addressing in the recent versions, we have included an additional System event that can be configured with the relevant letters and reminders.

"Booking Amendment", can now be used as a system event and can be generated when changes have been made to a bookingwhere the booking status has not been changed.

System Event Prompts

When the system brings up a prompt to generate a system event, a new screenhas now been introduced, with some further options.

The system will still default to the standard system event, however you now have the option to change this to generate an alternative system event if you prefer.

Honday Manager : Booking Syste	em Event		
Holiday Manager			
Do you want to generate	the following	system even	t?
New Booking Status - Fu	ıll Paid	oyoteni oron	•
Ves	1	0	

Manual System Events

In certain situations the standard system events may not be relevant to be generated. For example for a new provisional booking, you may have a number of letters, emails, SMS text message and reminders setup, however for a particular property or occasion you may wish to generate a slightly different series of events.

To do this we have given users the option to add an unlimited amount of manual system events with the appropriate events linked to each. When the system brings up the prompt to generate the system event, as per above section, you have the option to override this and choose a different event in its place.

Holiday Manager : S	System Settings							
loliday Mar	nager							
				-				
npany Details Ger	neral Settings Ov	vner Property Holid	ay Maker Maintenan	ce Company Price	Bands Booking	Information Extras 1	nvoice Type Syst	em Events
New Sy	ystem Events							
				Add				
- Configu	ure System Events	1						
S	ystem event			-	Priority			
Ger	nerate letter 📄				Assign to	· · ·		
Ge	enerate SMS 📄				Reminder in	-	days	
Ad	dd reminder 🔲							
				Add				
9	SystemEvent	SendLetter	SendSms	Reminder	Priority	Assignedto	Delete	
N	lew Booking	Paid in full - guest		1	(1) High	ian	Delete	
N	ew Booking - F	owner - new boo		5	(2) Low	ian	<u>Delete</u>	
N	ew Booking	new booking mer		7	(3) Normal	ian	<u>Delete</u>	
N	ew booking fo	new booking mer					<u>Delete</u>	
N	ew Booking St	owner - new boo					Delete	
•				III			Þ	
							Close	Savo
							Liose	Save

Additional Booking Merge Codes

For this version we have introduced the following new merge codes, for use in generating letters, emails and other correspondence.

Booking Nights	-	#b_nights
Total Guests	-	#b_partytotal
Adult guests	-	#b_adults
Children	-	#b_children
Infants	-	#b_infants

This complements the new functionality introduced in version 2.0.16, where we can now specify the number and type of guests for each booking.

Additional Items

On the booking and availability screen the refresh button no longer resets the calendar to the current month. This ensures that any additions to the calendar for future dates are instantly visible.

Also on the Booking and Availability screen the "Date To" search option has been changed to ensure you can never select a date prior to the "Date from" field. This makes the searching by date quicker and easier to carry out.

There is now an option to remove unwanted or out-dated credit card details from the holidaymaker screen.

After adding a new holidaymaker record and clicking the save button, you now have the option to make further additions or amendments to the information. You are then able to resave this.