



HLS Solutions Ltd Update Notes

Version 2.0.20

Last Updated - 30th March 2012

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Specialists in software,
website and design solutions
for the holiday letting industry
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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 **2.0.20**.

This version has been released as an interim release to implement a number of requests and observations picked up by system users.

The main features included in this version are:

- Ability to add detailed guest information after a booking is complete
- Adding a named daily task from reporting section
- Blacklisted holidaymaker changes
- Cleaner Report – Addition of unavailable periods and owner bookings
- Detailed price band information more accessible
- Easier process for adding brand new holidaymakers to a new booking
- Improvements to the property management date reporting
- Improvements to the property management section
- Increased functionality to the Latest Activity Section
- New functionality if you select for full balance to be paid at time of deposit
- New refunded holidaymaker deposit section – with new merge codes
- New Unavailable Property Status
- Option to have a set deposit amount, rather than percentage
- Option to leave first name blank if unknown on new holidaymaker
- Owner booking additional merge codes

Ability to add detailed guest information after a booking is complete

Before now, once a booking was made, you were unable to return to the booking and add in detailed guest information and/or party numbers. For version 2.0.20 this has now been changed to allow this to be amended at any point.

Holiday Manager : Booking View/Edit

Holiday Manager Status: Full Paid

Booking Info | Booking Summary | Booking History

Booking
 Booking Ref No: B2012/0004
 Booking From: 19/05/2012 Booking To: 26/05/2012 Nights: 7
 Holiday Cost: 520.00 Short Break Available

Property
 Ref No: P2010/0004 Title: Eco Retreat
 Notes:

Holiday Maker
 Ref No: H2011/0007 Source: Referral
 Name: Ms Janet Heather
 Address: 89 BOLTON WAY, , Birmingham - B18 6TR, ,
 Telephone: 123456
 E-mail: Car Reg:

Party
 Total in Party: 8 Adults: 4 Children: 2 Infants: 2
 Guest Information

Extra's available

Name	Desc	Price	Include	Include Rent	Num Avail
Booking Charge		20.00	<input checked="" type="checkbox"/>	N	1.0
Cancellation Insurance		10.00	<input checked="" type="checkbox"/>	Y	0.0
Deposit (Refundable...)		100.00	<input checked="" type="checkbox"/>	N	1.0
Large Hamper	Welcome Hamper - ...	75.00	<input type="checkbox"/>	N	1.0
Small hamper	Welcome Hamper - ...	35.00	<input type="checkbox"/>	N	1.0

Agent Notes | Guest Notes | Owner Notes | Maintenance Notes

Total Rent: 520.00
 Total Extra: 130.00
 Inclusive Extra: 10.00
 Rent showed to Holiday Maker: 520.00
 Extra showed to Holiday Maker: 120.00

Buttons: Send Letter, Add Notes, Cancel Booking, Receive Monies, Send Mail, Reprint, Close, Book

Adding a named daily task from reporting section

We have always been able to add a daily task to all of the recipients of a generated report. However, we have now improved this functionality by allowing you to add a custom title to the daily task, making it much easier to track and manage your tasks.

	Mar. Feature 9	Mar. Feature 10	Mar. Feature 11	Mar. Feature 12	No. of Bookings	Total Days Booked	No. Days UnAvailable	Total Days Available	Occupancy %	Total Earned
ss		Housekeeping...			10	70	2	351	19.94	2,176.00
ss		Housekeeping...			9	62	0	365	16.99	3,920.00
	Open Fire				22	154	0	365	42.19	14,336.00
		Housekeeping...			12	84	0	365	23.01	4,196.00
					4	28	0	365	7.67	1,631.00
ss		Housekeeping...			2	14	0	365	3.84	802.00
					7	49	0	365	13.42	4,751.00
ss					4	28	0	365	7.67	2,572.00

Select all | Deselect all

Generate letter Queue

Generate SMS

Add Task Assign to

Add reminder Priority Add

Buttons: Close, Export, Print, Send

Blacklisted holidaymaker changes

To speed up the booking process we have made a couple of changes to the way Blacklisted holidaymakers are shown on the search screen. By default, Blacklisted holidaymakers now appear on all searches, plus the current status is highlighted to make it more noticeable.

The screenshot shows the 'Holiday Manager : Search Holiday Maker' window. On the left, there are search filters: 'Ref No', 'First Name', 'Surname', 'Town', and 'Postcode'. Below these are two checkboxes: 'Include Archived' (unchecked) and 'Include Blacklisted' (checked). The main area displays a 'Search Result' table with the following data:

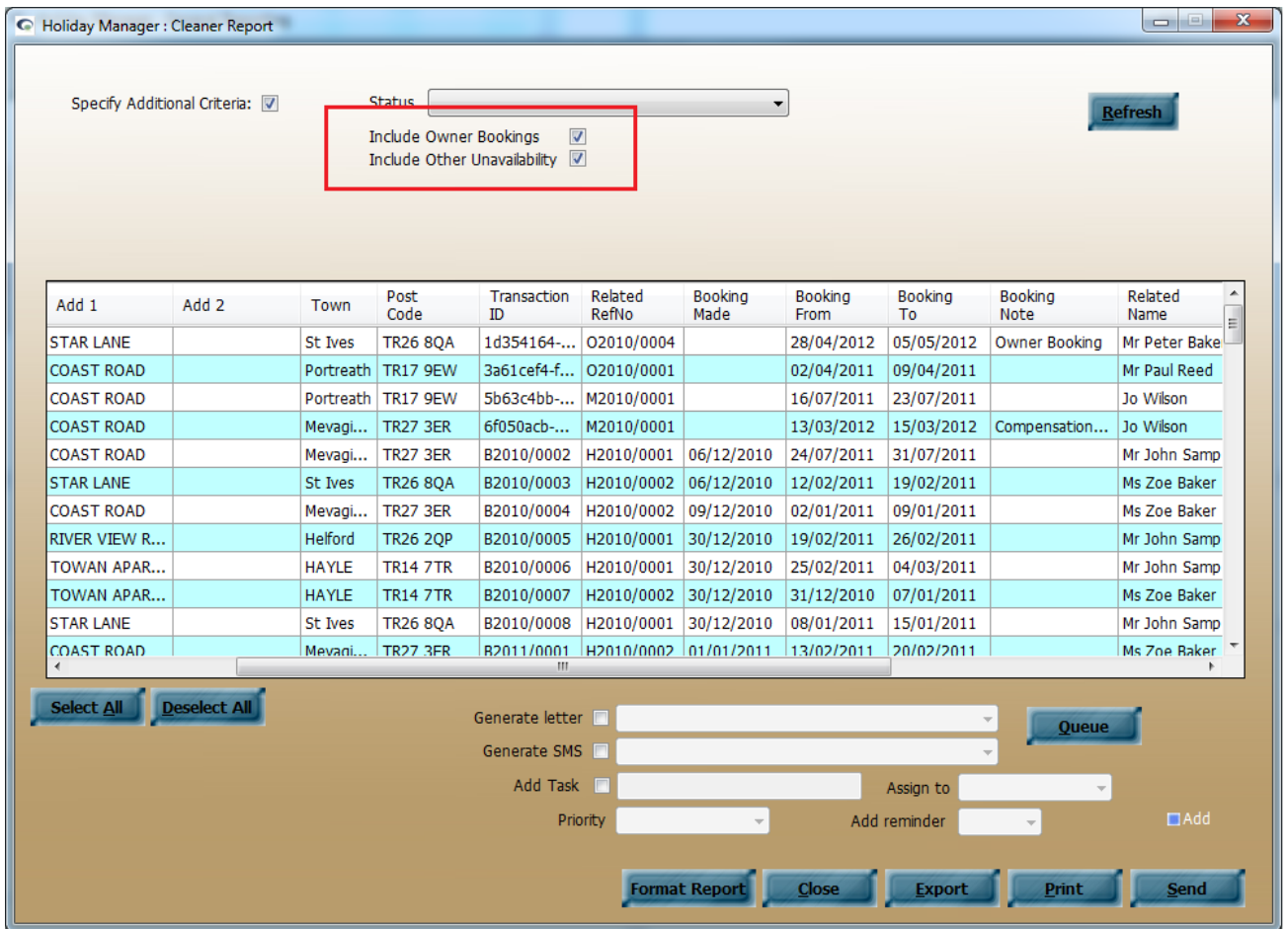
Ref #	First Name	Surname	Town	Postcode	Status	Enquiry Source
H2010/0001	John	Sampson	Swindon	OX9 4EK	BLAC...	Website
H2010/0002	Zoe	Baker	Glasgow	G29 6GT	Active	BLACKLISTED
H2011/0001	Gerald	Weston	Cardiff	CF56 9IU	Active	Referral
H2011/0002	john	smith			Active	
H2011/0004	janet	baker			Active	
H2011/0005	Jackie	Stewart	Gloucester	GL8 7TR	Active	
H2011/0007	Janet	Heather	Birmingham	B18 6TR	Active	Referral
H2011/0008	Stephen	Jones	Cheltenham	GL4 5RT	Active	Website
H2011/0009	Jill	Patterson	Gloucester	GL45 9UI	Active	
H2012/0001	JOE	BLOGGS			Active	
H2012/0002	David	Williams	Bath	BS4 5TR	Active	
H2012/0003	Helen	Minnow			Active	

At the bottom of the window are 'Add New' and 'Refresh' buttons.

Cleaner Report - Addition of unavailable periods and owner bookings

In order to be able to provide a report of bookings to a property cleaner, or indeed just for internal use, the Cleaner report has now been enhanced to give the option to include periods of unavailability. This can be Owner bookings or simply periods when the property is booked out against a maintenance supplier.

At the top of the Cleaner report screen there are now two tick boxes, which when ticked will add the unavailable items onto the report screen.



Detailed price band information more accessible

We now have significantly more information stored on the price band section, as part of the new functionality that was introduced in version 2.0.19. For this version we have continued to enhance this by upgrading the quick view options from the property and booking and availability screens, showing much more detailed price band information on the preview screens.

Select	Property RefNo	Name	Locality	Type	Sleeps	Bed Rooms	Price Band	Changeover Day
<input type="checkbox"/>	P2010/0001	The Lodge	Portreath	Lodge	6	3	test	Saturday
<input type="checkbox"/>	P2010/0002	Towan Ap...	Hayle Tow...	Apartment	3	1	Band 1	Friday
<input type="checkbox"/>	P2010/0003	Rock Cott...	Mevagissey	Detached	8	3	The Cotta...	Sunday
<input type="checkbox"/>	P2010/0004	Eco Retreat	St Ives	Detached	10	5	Seaview C...	Saturday
<input type="checkbox"/>	P2010/0005	Church View	Exeter	House	4	2	Band B	Saturday
<input type="checkbox"/>	P2010/0006	Eden Reach	Falmouth	Cabin	4	1	Band B	Saturday
<input type="checkbox"/>	P2010/0007	Treetops	Brixham	Detached	8	4	The Cotta...	Saturday
<input type="checkbox"/>	P2010/0008	River View	Helford	House	4	2	Seaview C...	Saturday

Holiday Manager : Band Price

Holiday Manager

Band Name

Year

Changeover Day

Date From	Is Short Break?	Price	Min Short Br Charge	Calendar Notes
07/01/2012	<input checked="" type="checkbox"/>	0.00	0.00	
14/01/2012	<input checked="" type="checkbox"/>	0.00	0.00	
21/01/2012	<input checked="" type="checkbox"/>	0.00	0.00	
28/01/2012	<input checked="" type="checkbox"/>	0.00	0.00	
04/02/2012	<input checked="" type="checkbox"/>	0.00	0.00	
11/02/2012	<input checked="" type="checkbox"/>	400.00	0.00	
18/02/2012	<input checked="" type="checkbox"/>	425.00	0.00	
25/02/2012	<input checked="" type="checkbox"/>	350.00	0.00	
03/03/2012	<input checked="" type="checkbox"/>	375.00	0.00	
10/03/2012	<input checked="" type="checkbox"/>	400.00	0.00	
17/03/2012	<input checked="" type="checkbox"/>	450.00	0.00	
24/03/2012	<input checked="" type="checkbox"/>	500.00	0.00	
31/03/2012	<input checked="" type="checkbox"/>	525.00	0.00	
07/04/2012	<input checked="" type="checkbox"/>	500.00	0.00	
14/04/2012	<input checked="" type="checkbox"/>	495.00	0.00	
21/04/2012	<input checked="" type="checkbox"/>	475.00	0.00	

Easier process for adding brand new holidaymakers to a new booking

When creating a new booking, if you choose the “Add New” option we have made changes to speed up this process. When you have finished adding the new holidaymaker details and close the screen, the system will now return direct to the booking screen with this holidaymaker selected as the selected guest.

First Name	<input type="text"/>	H2011/0004	janet	baker			Active	
Surname	<input type="text"/>	H2011/0005	Jackie	Stewart	Gloucester	GL8 7TR	Active	
Town	<input type="text"/>	H2011/0007	Janet	Heather	Birmingham	B18 6TR	Active	Referral
Postcode	<input type="text"/>	H2011/0008	Stephen	Jones	Cheltenham	GL4 5RT	Active	Website
Include Archived	<input type="checkbox"/>	H2011/0009	Jill	Patterson	Gloucester	GL45 9UI	Active	
Include Blacklisted	<input checked="" type="checkbox"/>	H2012/0001	JOE	BLOGGS			Active	
		H2012/0002	David	Williams	Bath	BS4 5TR	Active	
		H2012/0003	Helen	Minnow			Active	

Improvements to the property management date reporting

To make the management date report more user friendly and easier to use the headings are now populated by your own user defined headings rather than generic labels. This enables your viewed, printed and exported reports to display with your custom headings.

Postcode	Prop Type	No. of Beds	Owner Name	PAT Test	Electric Safety	Gas Safety	Inspection	Inventory
TR27 3ER	Detached	3	Dr Rebecca W...	20/01/2012	19/01/2012			

Improvements to the property management section

Similar to the above property management report, we have also looked at the property management section on the property screen and carried out some improvements.

A tick box activation has been added to each of the date fields, to clearly show which of the date screens are in use for this property. In addition, dates that are not currently in use have been greyed out, making it immediately clear which are and aren't in operation.

Holiday Manager Property Name: Eco Retreat Status: LIVE

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

Provider 1
 Type [v]
 Ref No [] [...]
 Company Name []

Provider 2
 Type [v]
 Ref No [] [...]
 Company Name []

Provider 3
 Type [v]
 Ref No [] [...]
 Company Name []

Provider 4
 Type [v]
 Ref No [] [...]
 Company Name []

Provider 5
 Type [v]
 Ref No [] [...]
 Company Name []

Date Settings

PAT Test	<input checked="" type="checkbox"/> 30/03/2012 [v]	Inventory	<input type="checkbox"/> 30/03/2012 [v]	<input type="checkbox"/> 30/03/2012 [v]
Electric Safety	<input type="checkbox"/> 30/03/2012 [v]		<input type="checkbox"/> 30/03/2012 [v]	<input type="checkbox"/> 30/03/2012 [v]
Gas Safety	<input type="checkbox"/> 30/03/2012 [v]		<input type="checkbox"/> 30/03/2012 [v]	<input type="checkbox"/> 30/03/2012 [v]
Inspection	<input type="checkbox"/> 30/03/2012 [v]		<input type="checkbox"/> 30/03/2012 [v]	<input type="checkbox"/> 30/03/2012 [v]

Date Added 02/12/2010

[View Booking Schedule](#) [Close](#) [Save](#)

Increased functionality to the Latest Activity Section

The latest activity section has proved to be an excellent tool for tracking the history of events that have taken place within the program. In this version we have taken this a step further by reviewing the events that were being picked up and adding a number of new events.

You will see in this version the addition/improvement to records showing booking status changes, invoices, receipts, new bookings and statements amongst others.

As always all of the events have an underlined link that will allow you to open the linked record that this applies to. This makes it a hugely powerful tool for tracking what has been completed.

Holiday Manager : Latest Activity

Holiday Manager

< 29/03/2012 >

Date/Time	Event By	Event Of	Event Type	Description	Owner Ref No	Property Ref No	HolidayMaker Ref No
29/03/2012 03:58 PM	ian		Property Upda...	Property info updated: Corn...		P2010/0010	
29/03/2012 03:58 PM	ian		Property Upda...	Property info updated: Corn...		P2010/0010	
29/03/2012 02:50 PM	ian		Property Upda...	Property info updated: Eco R...		P2010/0004	
29/03/2012 02:50 PM	ian		Property Upda...	Property info updated: Eco R...		P2010/0004	
29/03/2012 02:50 PM	ian		Property Upda...	Property info updated: Eco R...		P2010/0004	
29/03/2012 02:50 PM	ian		Property Upda...	Property info updated: Eco R...		P2010/0004	
29/03/2012 02:48 PM	ian	Letter	Letter	ijwoolley@yahoo.co.uk	O2010/0004	P2010/0004	H2011/0001
29/03/2012 02:47 PM	ian	Letter	Letter	ijwoolley@yahoo.co.uk	O2010/0004	P2010/0004	H2011/0008
29/03/2012 02:43 PM	ian	Letter	Letter	ijwoolley@yahoo.co.uk	O2010/0004	P2010/0004	H2010/0002
29/03/2012 02:35 PM	ian			Change of booking status		P2010/0004	H2011/0009
29/03/2012 02:34 PM	ian			Change of booking status		P2010/0004	H2010/0002
29/03/2012 02:29 PM	ian		Holidaymaker ...	Holidaymaker info updated: ...			H2012/0003
29/03/2012 02:29 PM	ian		Holidaymaker ...	Holidaymaker info updated: ...			H2012/0003
29/03/2012 02:29 PM	ian		Holidaymaker ...	Holidaymaker info updated: ...			H2012/0003
29/03/2012 02:28 PM	ian	Letter	Letter	ijwoolley@yahoo.co.uk	O2010/0004	P2010/0004	H2011/0005*
29/03/2012 02:27 PM	ian		Property Upda...	Property info updated: Eco R...		P2010/0004	
29/03/2012 02:27 PM	ian		Property Upda...	Property info updated: Rock ...		P2010/0003	

[View Record History](#) [Cancel](#)

New functionality if you select for full balance to be paid at time of deposit

We have had a number of occasions where a deposit and the balance is due within a few days of one another, rather than the holidaymaker make two separate payments, it is easier for them to pay everything in one go.

In order to facilitate this, there is the option to select the extras to be due within the deposit. There is also the option to use the deposit override to equal the whole price of the booking. In this instance the total balance that is due is now zero.

Where this is done, the system will now only raise one invoice for the total amount, rather than two separate invoices for the deposit and full balance.

Holiday Manager: New Booking

Holiday Manager Status: Provisional Booking

Booking Info | **Booking Summary**

Booking Ref No:

Booking From: 12/05/2012 Booking To: 19/05/2012

Holidaymaker: Ms Janet Heather

Holiday rental cost: 510.00 Override

Discount Code: 0.00 Override

0.00 % + Fixed 0.00 [Clear](#)

Extra	Price	Quantity	Discount	VAT	Select
Booking Charge	20.00	1.00	0.00	0.00	<input checked="" type="checkbox"/>
Cancellation Ins...	10.00	1.00	0.00	0.00	<input type="checkbox"/>
Deposit (Refund...	100.00	1.00	0.00	0.00	<input checked="" type="checkbox"/>

Due With Deposit

Card Surcharge: [Clear](#) 0.00

VAT: 0.00

Total Holiday Cost: 630.00

Agent Notes | Guest Notes | Owner Notes | Maintenance Notes

Deposit Payment Due by: 06/04/2012 Override

30% of Holiday Cost: 510.00

Selected Extra's: 120.00

Card Surcharge: 0.00

VAT: 102.00

Total Deposit Due: 732.00

Balance Payment Due by: 14/04/2012

Balance of Holiday Cost: 0.00

Selected Extra's: 0.00

Card Surcharge: 0.00

VAT: 0.00

Total Balance Due: 0.00

Booking Summary

Total Holiday Cost:

Owner Income:

Agency Income - Owner:

Agency Income - Holidaymaker:

Holidaymaker deposit:

Other Extras:

[Send Mail](#) [Preview](#) [Back](#) [Close](#) [Book](#)

New refunded holidaymaker deposit section – with new merge codes

As part of our on-going improvements to the system, in this version we have looked at the holidaymaker deposit, and at ways of making this easier to track when a deposit is refunded. Within the daily accounts there is a section that displays which cash transactions are due to be refunded, but we also appreciated that some customers may take a cheque deposit that is never banked. Because of this we have introduced a new section on the booking history that deals with all scenarios.

Towards the bottom of the page on the booking history, there is now a Deposit Return section; this gives you the option to select the date the deposit was returned to the customer, along with any accompanying notes. Once the date has been selected, the booking status will also now change to completed. This enables a new colour to be set for the completed status and also provides you with an obvious visual display of which bookings have an outstanding deposit.

Holiday Manager Booking View/Edit Status: Full Paid

Booking Info | Booking Summary | **Booking History**

Booking History

Reference	Event Type	Event By	Event Time	Description
T2011/0143	Task	ian	03/10/2011	full paid booking
T2011/0152	Task	ian	27/10/2011	Generate Cleaner Report

Booking Transactions

Transaction Date	Invoice Date	Receipt Date	Event By	Transaction Reference	Credit	Debit
03/10/2011	03/10/2011	03/10/2011	ian	REC00039	481.95	0.00
03/10/2011	03/10/2011		ian	INV00115	0.00	481.95

Deposit Return

Date Returned: Notes:

Holiday Manager System Settings

Company Details | General Settings | Owner | Property | Holiday Maker | Maintenance Company | Price Bands | **Booking Information** | Extras | Invoice Type | System Events

Discount Code

Code:

Name:

Rate (%):

Fixed Amount:

Booking Status Colour Coding

Provisional Booking	Grey	
Deposit Received	Orange	
Full Paid	Red	
Unavailable	Blue	
Cancel	Green	
Completed	White	

Code	Name	Rate (%)	Amount
low	Low occup...	10.00	0.00
Referral	Referral Dis...	7.50	0.00
rpt456	Repeat Boo...	5.00	0.00
System	Initial Disco...	0.00	0.00

% Deposit:

Fixed Amount:

Deposit Due: Days after holiday booked

Balance Due: Days Before holiday commences

Cancellation Fee

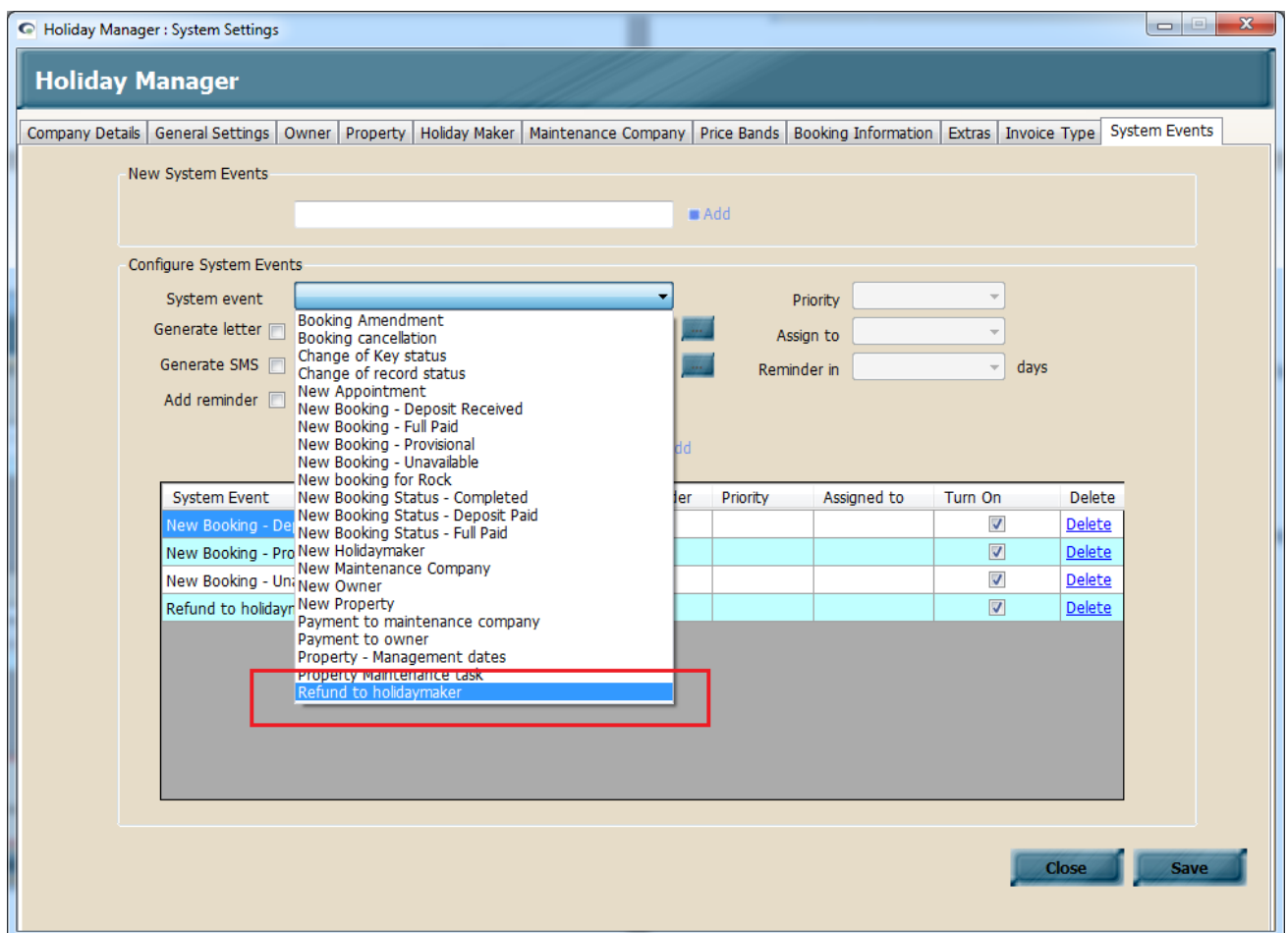
Owner
 Agent

To complement this new functionality, we have introduced a new system event, Refund to holidaymaker, which is triggered by the selection of a new return date on a booking. This enables you to produce a corresponding letter to the deposit return if required, or if you prefer a daily task reminder, SMS or email.

As part of this functionality, we have also introduced two new merge codes related to this functionality, and the two new fields.

#b_depredate

#b_deprenotes



New Unavailable Property Status

There may be scenarios where a property is added to the system, but is not being actively marketed, or where bookings are not being taken. We already have an archive status for properties that are no longer active, however we felt that the archive status was not ideal for this. We have therefore introduced an additional status called simply "Not Available". Properties with this status will not appear on the booking and availability section, but will remain fully accessible for recording information, adding jobs to and reporting.

Holiday Manager : Property View/Edit

Holiday Manager Property Name: Corner Lodge Status: LIVE

General Marketing Information Photographs Maintenance Management Documentation Keys Transactions History Extra

Ref No P2010/0010 Title Corner Lodge Source Commission Rate 15.00
 Locality Tehidy Phone Booking Charge 0.00
 Property Name/Number Corner Lodge
 Address
 TEHIDY
 Town Camborne
 County
 Post Code TR14 9IU
 Country

Owner Ref	Owner Name	% Own
02010/0011	Julia	100.00

■ Add Owner

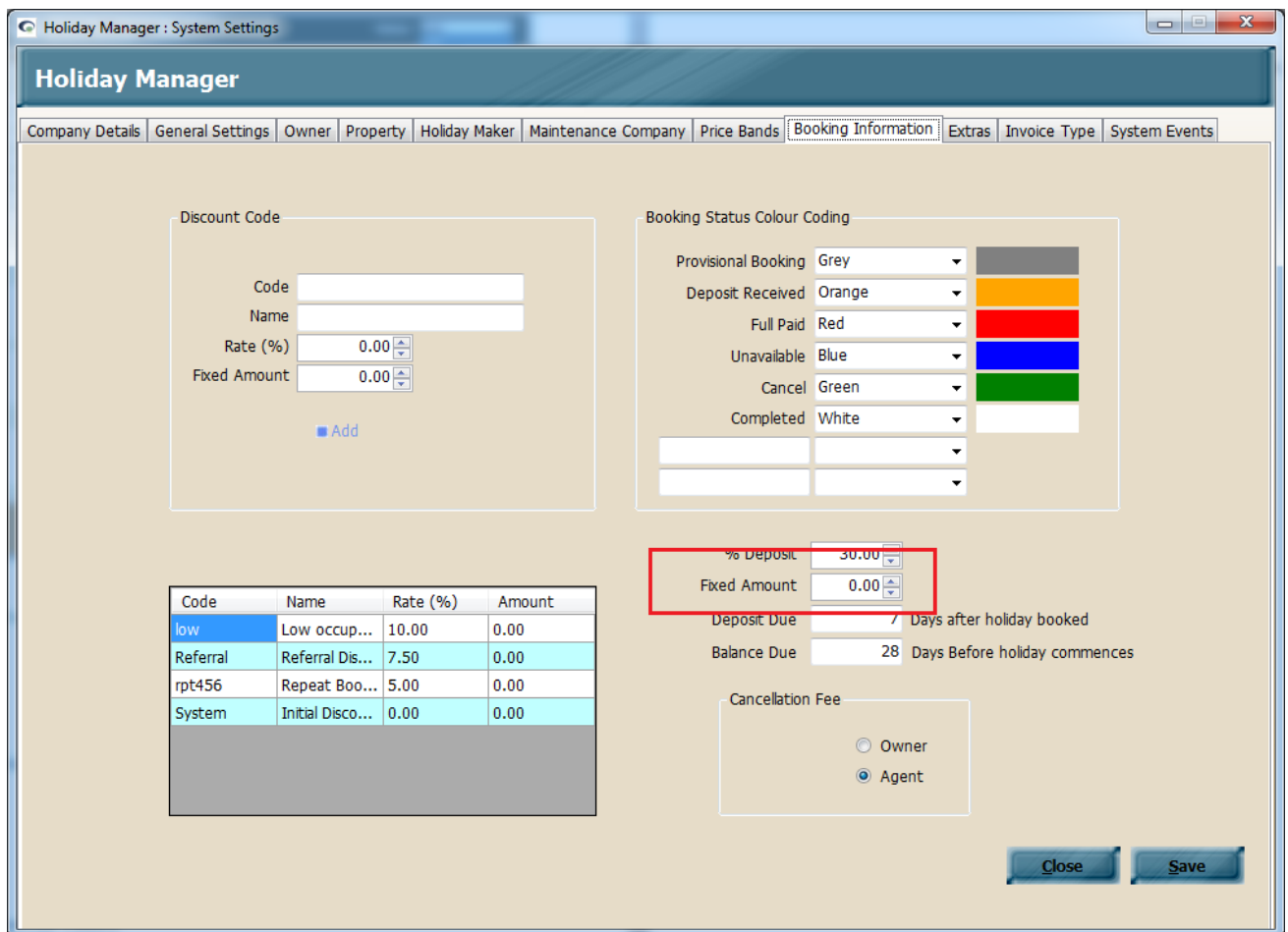
Notes
 Notes
 Notes
 Directions
 Directions

Date Added 06/12/2010 View Booking Schedule Close Save

Option to have a set deposit amount, rather than percentage

We are aware that some agents take a fixed amount of deposit, rather than a percentage. In order to accommodate this, we have now introduced a facility where either a set amount or a deposit can be specified in the system settings.

On the Booking Information section, there is a new option called fixed amount, which when populated will automatically complete the invoice amount with a set fee, rather than calculate a percentage of the total holiday cost.



Option to leave first name blank if unknown on new holidaymaker

For online bookings and other situations where the guest details are not fully available it can be frustrating if the system is trying to force you to enter some text into a field, where you do not have the correct information. To resolve this, we have removed the block on this section which prevents you from saving without the first name of a holidaymaker specified.

When you are aware of these details you can simply access the holidaymaker screen and enter the correct details accordingly.

Owner booking additional merge codes

Earlier we detailed the new reporting and functionality for owner bookings and times where the property is marked unavailable. As an additional part of this new functionality, we have also introduced some extra merge fields for use in letters that relate to this. These are:

#b_unavailabletodate

#b_unavailablefromdate