



HLS Solutions Ltd Update Notes

Version 2.0.23

Last Updated – 5th September 2012

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Specialists in software,
website and design solutions
for the holiday letting industry
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Registered in England and Wales
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Version Summary

Below you will find brief information on the changes that have been introduced for the latest release of the software, version **2.0.23**.

The main features included in this version are:

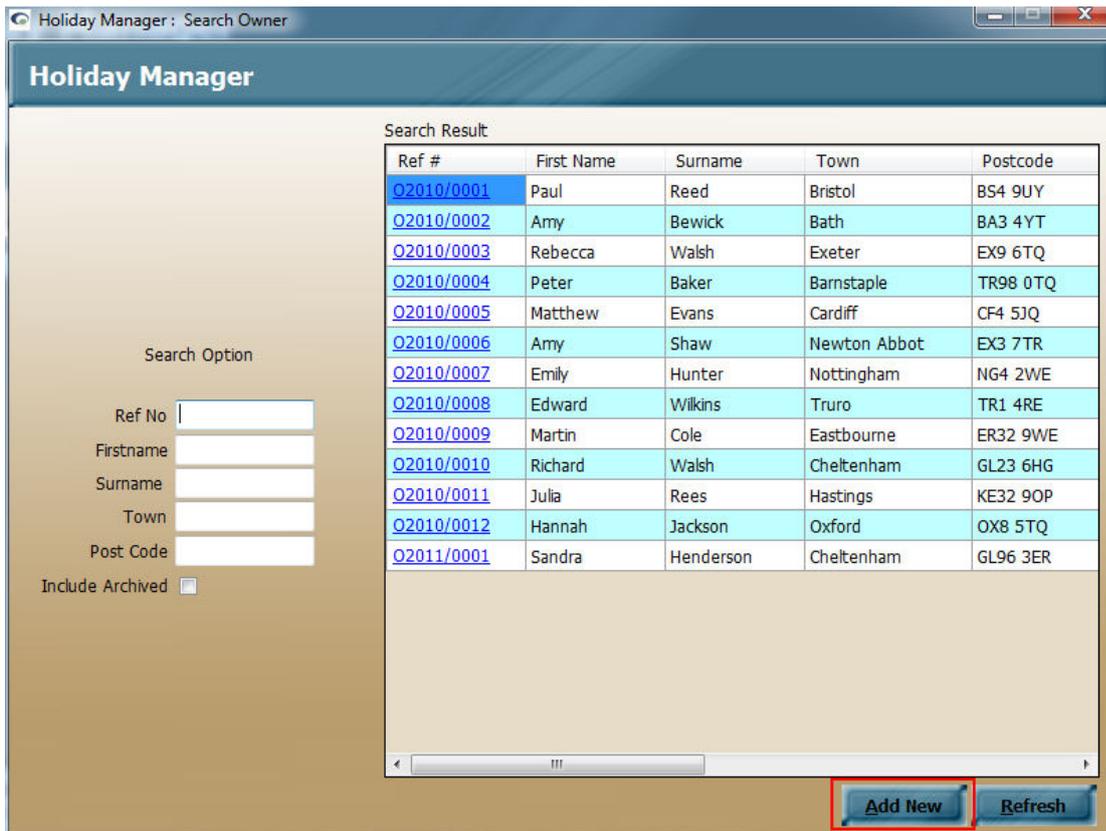
- Ability to add new records from all information search screens
- Additional option to view bookings through View/Amend record
- Amendments to availability search and layout
- Option to make an owner booking direct from owner screen
- Improvements to booking notes options
- All dropdown menus are now in alphabetical order
- Ability to make payments direct from relevant information screen
- More in depth history information recorded
- Additional booking diary colours for booking statuses
- Company name option for guest information
- No. of nights for owner bookings and unavailable periods
- New Invoices Due report
- New Receipts report
- Additional booking tariff import options

Add new record options

When using the View Amend record option to search for an existing record, there may be occasions when the record you are looking for has not yet been created.

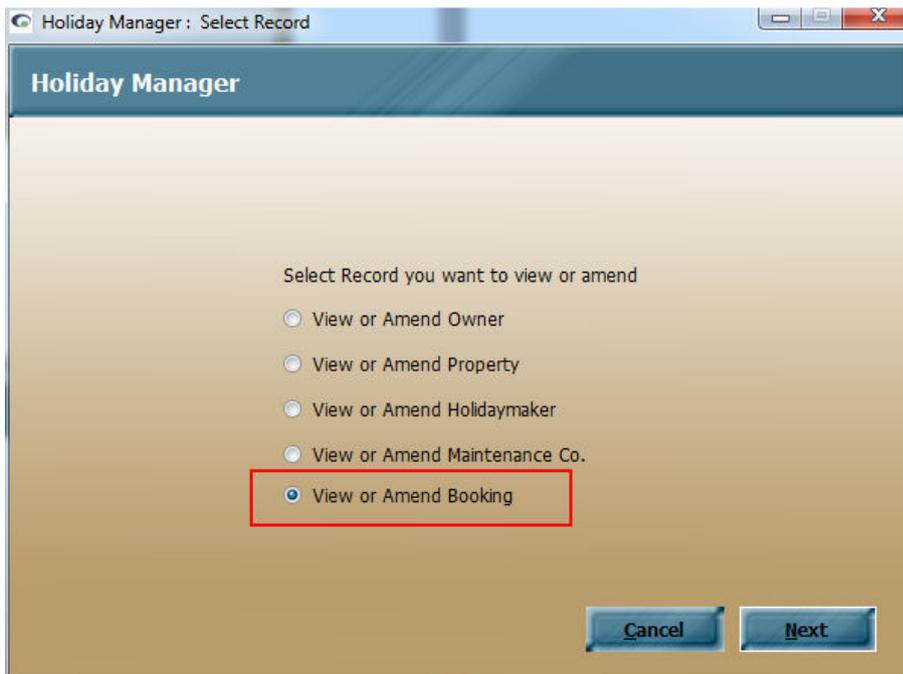
In this scenario, rather than returning to the Add New Record option to add this in, we have introduced a new option at the bottom of the screen to Add New.

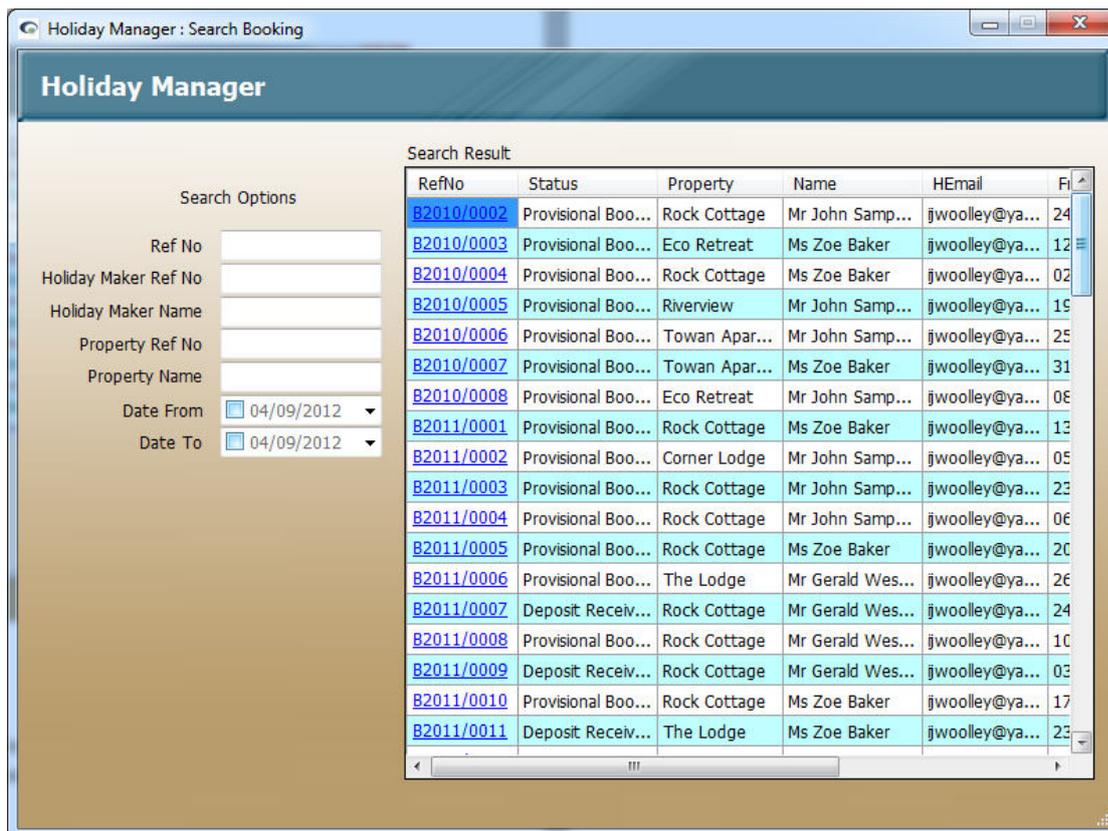
This feature is now available on Owner, Property and Maintenance Company, in addition to the Holidaymaker screen.



New View/Amend Booking Option

In order to make it easier to view your existing bookings, we have now introduced an option on the standard View/Amend record option to access any existing bookings. Simply select the View or Amend Booking option and click Next to bring up the search screen.





Amendments to availability search and layout

On the booking and availability screen the postcode search has now been replaced with the property name to help speed up the search for relevant properties.

We have also changed the Compare button as shown below. Clicking the Select tick box will display the availability for up to four separate properties, allowing you to view several availability screens concurrently.

Holiday Manager : Booking Availability

Holiday Manager

Search Option

Locality:

Date From:

Date To:

Sleeps:

No. Bed:

Child Friendly:

Pet Friendly:

Sea Views:

Garden:

Short Break:

Changeover Day:

Property Ref:

Brochure Ref:

Property Name:

11 records found

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	Riverview	Helford River	House	4	2	Seaview C...	Saturday
<input type="checkbox"/>	P2010/0009	Primrose F...	Bude	Detached	7	3	The Cotta...	Saturday
<input type="checkbox"/>	P2010/0010	Corner Lo...	Tehidy	Lodge	6	3	Band B	Saturday
<input type="checkbox"/>	P2010/0011	Lobster Pots	The Lizard	Flat	2	1	Band 1	Saturday

Availability Property Details

September

2012

Owner bookings

There is now the option to make an owner booking directly from the owner screen.

To do this click on the Properties tab on the owner record and this will list all of the Properties this owner is associated with.

In the right hand column you will now see an underlined link for each record called Owner Booking.

Holiday Manager : Owner View/Edit

Holiday Manager

Owner: Amy Status: LIVE

General Account Info Maintenance Providers **Properties** History Documentation Transactions

Property RefNo	Property Name	(%)Own	
P2010/0002	Towan Apartments	100.00	Owner Booking
P2010/0005	Church View	100.00	Owner Booking

Clicking this link will open the calendar for this property ready for you to select the relevant dates for the owner booking.

Select the Mark Unavailable option and the owner information will be automatically populated for this owner.

Unavailable For: Owner
RefNo: O2010/0002
Name: Mrs Amy Bewick
Unavailable From: 14/10/2012
Unavailable To: 21/10/2012
Nights: 7
Description: Owner staying with friends all week

Close Mark

Improvements to booking notes options

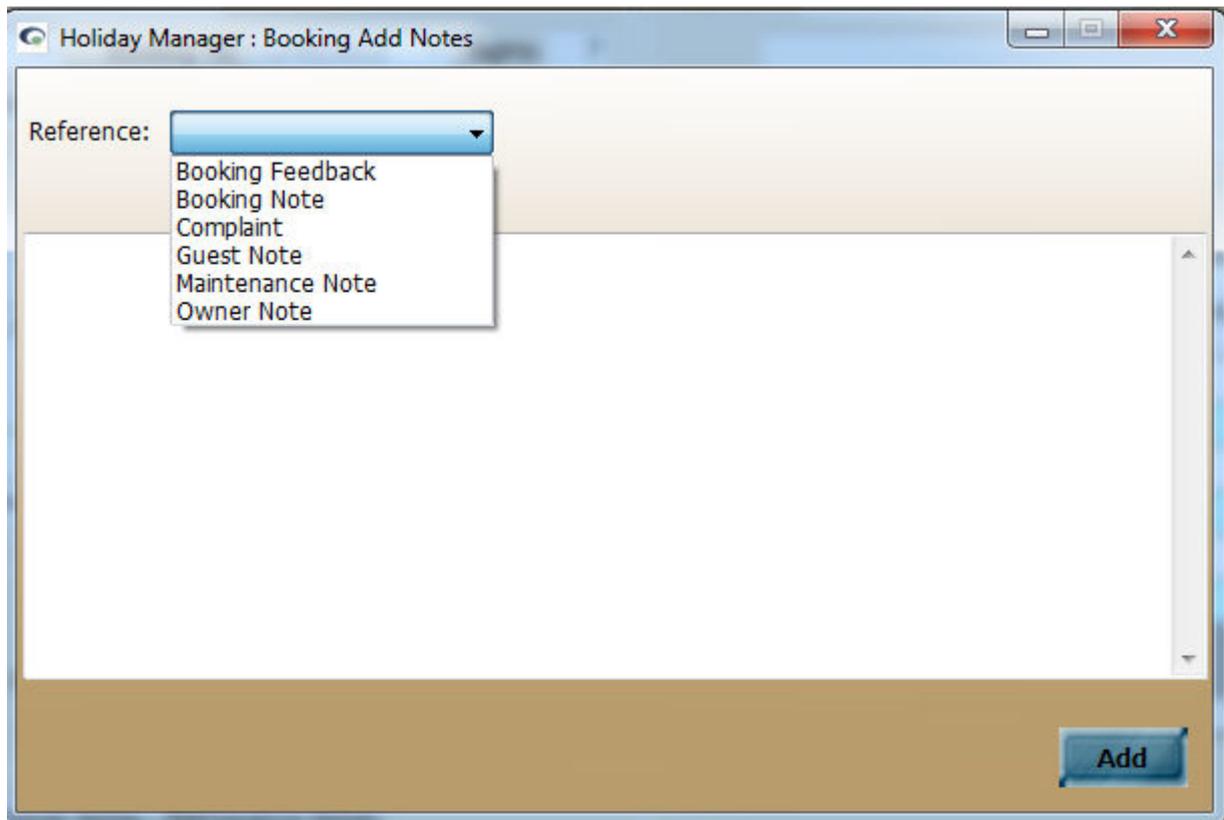
We have had a number of enhancements to the booking notes section recently, and that is continued in this version.

When you are accessing a booking, you have an Add Notes option at the bottom of the screen.

Total Rent	520.00
Total Extra	165.00
Inclusive Extra	10.00
Rent showed to Holiday Maker	520.00
Extra showed to Holiday Maker	155.00

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

When selected, a new screen will open. Click on the reference to access a dropdown menu to select the type of notes you want to add.



The options available are:

- Booking Feedback:** General feedback on the booking, can be used in future marketing and testimonials
- Booking Note:** General notes on the booking for internal use. Indicated as Agent notes on the booking screen
- Complaint:** Option to record complaint information in the Booking history.
- Guest Note:** Notes that will be used on invoices, booking confirmations etc. These will be seen by the Guest, so important that internal notes are not recorded here.
- Maintenance Note:** Any maintenance instructions or notes for the cleaner or other contractors
- Owner Note:** Any notes that you want to display to the Owner regarding the booking.

Any notes added here, will automatically be recorded in the Latest Activity section, along with the history information of any affected records.

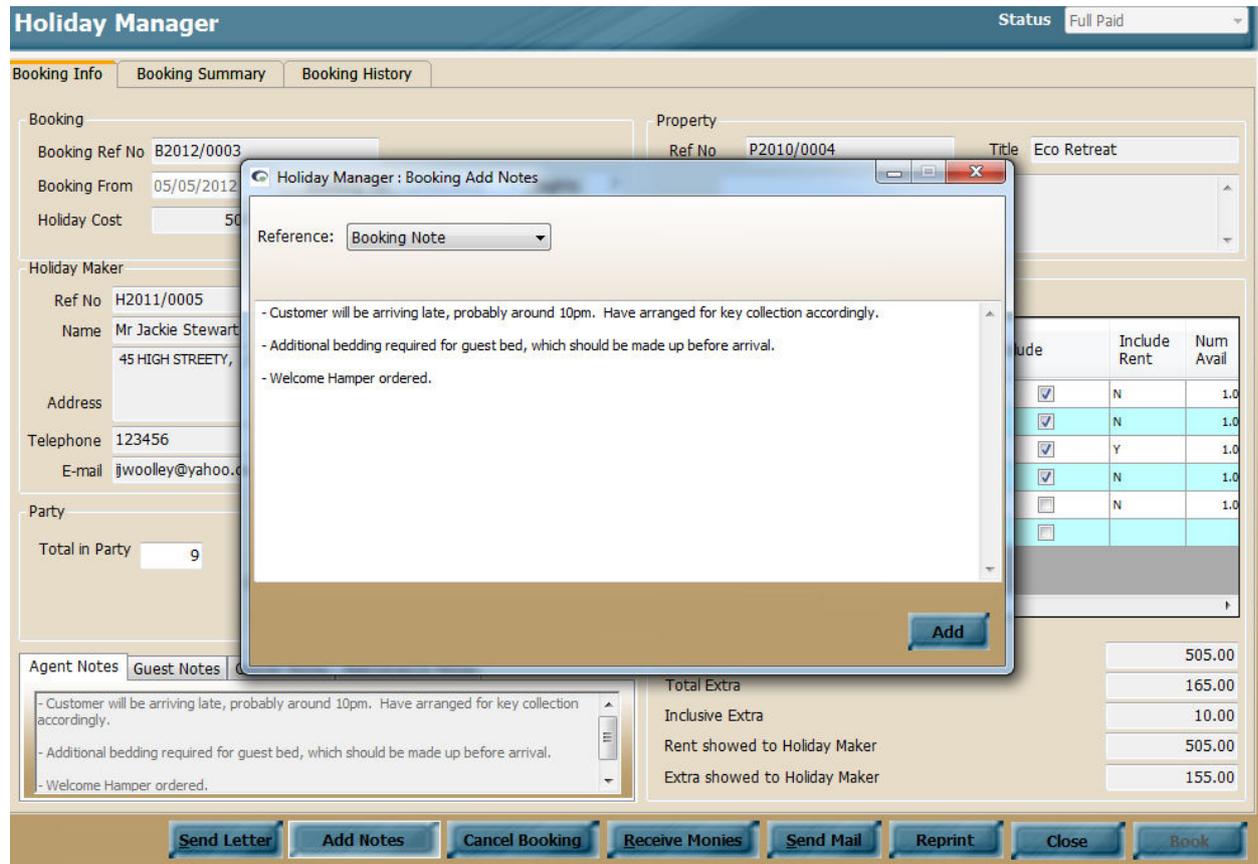
Date/Time	Event By	Event Of	Event Type	Description	Owner Ref No	Property Ref No	HolidayMaker Ref No
04/09/2012 12:38 PM	ian	U2012/0003		New Unavailable period	O2010/0002	P2010/0002	
04/09/2012 12:47 PM	ian		Guest Note	Guest Notes chn		P2010/0004	H2010/0001
04/09/2012 02:02 PM	ian		Booking Note	Customer will be arriving late,...		P2010/0004	H2011/0005
04/09/2012 02:02 PM	ian		Booking Note	Customer will be arriving late,...		P2010/0004	H2011/0005
04/09/2012 02:04 PM	ian		Booking Note	- Customer will be arriving lat...		P2010/0004	H2011/0005

Customer will be arriving late, probably around 10pm. Have arranged for key collection accordingly.

- Additional bedding required for guest bed, which should be made up before arrival.

- Welcome Hamper ordered.

If there is any content already recorded in any of these fields, this will display in the screen for you to edit, or add to as applicable.



Any system generated notes, will append, rather than replace any notes that are already in situ.

Making payments from information screens

In order to speed up the account processing in the program, we have introduced functionality that will allow you to make payments direct from the information screens, rather than having to use the Daily Account section.

This option is now available for payments to owners, maintenance companies and holidaymakers.

To access this functionality and check if there are any payments due, click on the Transactions tab. You will see that the screen is now split into two with the existing history of transactions appearing on the top half of the screen, with any Payments due to be made now showing on the lower half.

To make a payment, simply click on the reference link, which will open the relevant payment screen for this record.

Holiday Manager : Owner View/Edit

Holiday Manager

Owner: Rebecca Status: LIVE

General Account Info Maintenance Providers Properties History Documentation Transactions

Transaction

Date	Event By	Transaction Ref	Credit	Debit

Payment Info

RefNo	Name	Property RefNo	Reference	Balance
O2010/0003	Dr Rebecca Walsh	P2010/0003	Rock Cottage	4028.74

Date Added 01/12/2010 16:48

Add New Close Save

Holiday Manager : Make New Payment

Holiday Manager

New Payment

Payment To: Owner Statement Number: Auto Statement Notes:

Ref No: O2010/0003 Statement Date: 04/09/2012 Statement Total: 4028.74

Dr Rebecca Walsh THE SWALLOWS,, Withheld Monies: 0.00 Total Payment: 4028.74

Property: Rock Cottage Payment Method: Reference:

Include Transactions: All Holiday Commenced Holiday Complete

Booking Date	Receive Date	Booking From	Booking To	Booking	Reference
15/06/2011	15/06/2011	28/08/2011	04/09/2011	B2011/0036	Rock Cotta
15/06/2011	15/06/2011	10/07/2011	17/07/2011	B2011/0037	Rock Cotta
16/06/2011	16/06/2011	02/07/2011	09/07/2011	B2011/0039	Rock Cotta
16/06/2011	16/06/2011	18/09/2011	25/09/2011	B2011/0040	Rock Cotta
16/06/2011	19/07/2011	18/09/2011	25/09/2011	B2011/0040	Rock Cotta
15/06/2011	29/07/2011	14/08/2011	21/08/2011	B2011/0038	Rock Cotta
15/06/2011	18/09/2011	14/08/2011	21/08/2011	B2011/0038	Rock Cotta
15/06/2011	18/09/2011	28/08/2011	04/09/2011	B2011/0036	Rock Cotta
15/06/2011	18/09/2011	28/08/2011	04/09/2011	B2011/0036	Rock Cotta
03/10/2011	03/10/2011	16/10/2011	23/10/2011	B2011/0057	Rock Cotta

Booking Date	Invoice Date	Booking From	Booking To	Booking	Reference
15/06/2011	15/06/2011	28/08/2011	04/09/2011	B2011/0036	Rock Cott
15/06/2011	15/06/2011	10/07/2011	17/07/2011	B2011/0037	Rock Cott
16/06/2011	16/06/2011	02/07/2011	09/07/2011	B2011/0039	Rock Cott
16/06/2011	16/06/2011	18/09/2011	25/09/2011	B2011/0040	Rock Cott
16/06/2011	16/06/2011	18/09/2011	25/09/2011	B2011/0040	Rock Cott
15/06/2011	15/06/2011	14/08/2011	21/08/2011	B2011/0038	Rock Cott
15/06/2011	15/06/2011	14/08/2011	21/08/2011	B2011/0038	Rock Cott
15/06/2011	15/06/2011	28/08/2011	04/09/2011	B2011/0036	Rock Cott
15/06/2011	15/06/2011	28/08/2011	04/09/2011	B2011/0036	Rock Cott
03/10/2011	03/10/2011	16/10/2011	23/10/2011	B2011/0057	Rock Cott

Total Income: 4746.71 Total Expenditure: 717.97

Update Preview Close

More in depth history information recorded

In this version, we are providing even more information in each record history. This will ensure it is always clear exactly what has taken place within the system and when.

These new functions are available in both the individual record history, but also on the Latest Activity section on the main homepage. Clicking here will immediately provide you with a detailed summary of all actions that have taken on the system on that particular day.

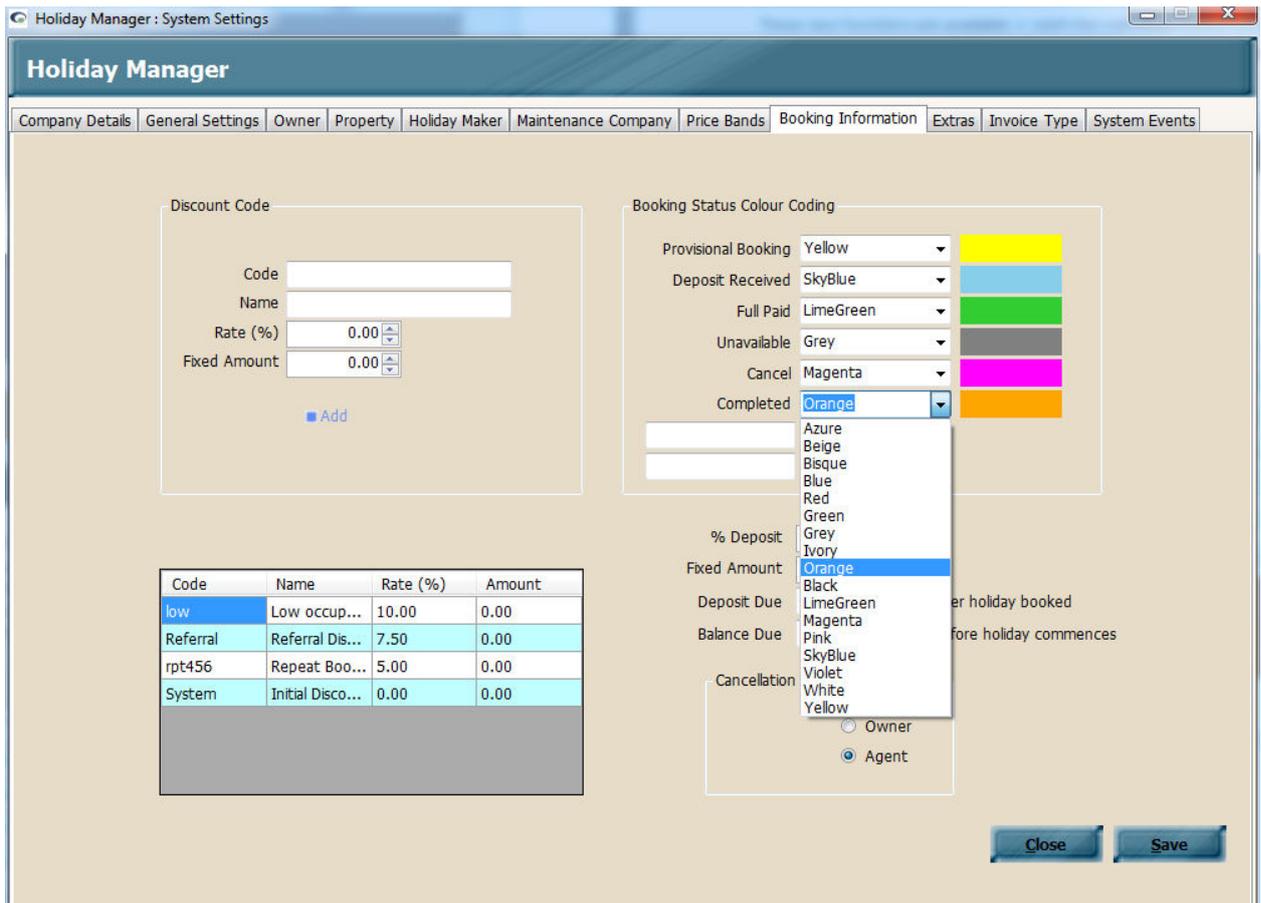
Date/Time	Event By	Event Of	Event Type	Description	Owner Ref No	Property Ref No	HolidayMa Ref No
20/08/2012 11:07 AM	ian	U2012/0002		New Unavailable period	O2010/0001	P2010/0001	
20/08/2012 11:09 AM	ian			New holiday booking		P2010/0004	H2010/00
20/08/2012 11:10 AM	ian	REC00061		Monies received in		P2010/0004	H2010/00
20/08/2012 11:11 AM	ian			Change of booking status		P2010/0003	H2010/00
20/08/2012 11:12 AM	ian	REC00061		Reversed Receipt		P2010/0004	H2010/00
20/08/2012 11:12 AM	ian	REC00063		Monies received in		P2010/0004	H2010/00
20/08/2012 11:12 AM	ian			Change of booking status		P2010/0004	H2010/00
20/08/2012 11:13 AM	ian		Cancelled boo...	Booking Cancellation		P2010/0002	H2010/00
20/08/2012 11:24 AM	ian	REC00064		Monies received in		P2010/0004	H2011/00
20/08/2012 11:24 AM	ian			Change of booking status		P2010/0004	H2011/00
20/08/2012 12:13 PM	ian		Holidaymaker ...	New holidaymaker created: J...			H2012/00
20/08/2012 12:13 PM	ian		Holidaymaker ...	New holidaymaker created: J...			H2012/00
20/08/2012 12:13 PM	ian			New holiday booking		P2010/0004	H2012/00
20/08/2012 12:57 PM	ian	Email	Email	ijwoolley@yahoo.co.uk	O2010/0001		
20/08/2012 01:01 PM	ian	Letter	Letter	ijwoolley@yahoo.co.uk	O2010/0011	P2010/0004	H2010/00
20/08/2012 01:09 PM	ian	Letter	Letter	ijwoolley@yahoo.co.uk	O2010/0011	P2010/0004	H2012/00
20/08/2012 04:08 PM	ian	Letter	Mulgrave new ...	Mrs Jill Patterson(ijwoolley@y...	B2012/0006		

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

Additional booking status colours

In order to easily view the availability status for your property, we have now increased the number of colours available. This allows more customisation and the ability to see instantly the status of a particular booking.

This functionality can be found in the System Settings, under the Booking Information tab.



Company name option for guest information

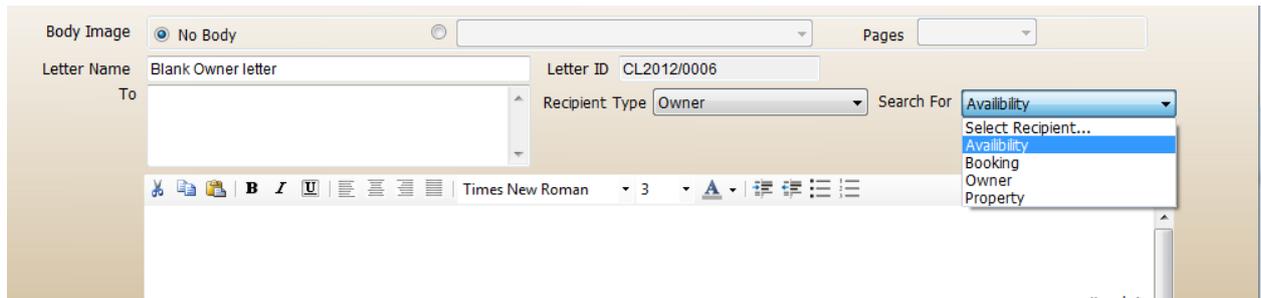
For this version, we have added a new field to the holidaymaker screen called Company Name. This allows the addition of a relevant company name to be added to a record for use in letters and documentation.

A merge code is also available for this field - **#h_companyname**

Owner bookings and Unavailability

When making an owner booking, or simply booking out a period of time when the property is unavailable, we have now introduced an additional field for the number of nights.

A new merge code - **#b_unavailablenights** is available for this, plus we have introduced a new recipient on the letters section called Availability that can be used to merge this information to owner letters.



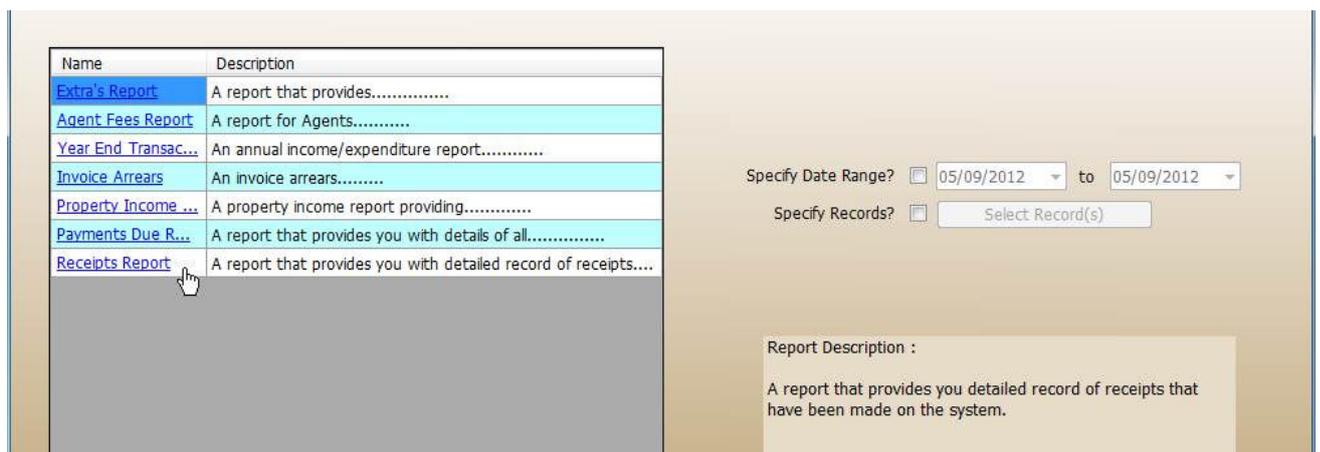
New accounts reports

For this version, we have introduced two new accounts reports.

- Payments Due Report - which provides you with information on all outstanding invoices.

This is a useful report to pull up any information and send reminders for invoices that are coming up for payment.

- Receipts Report - Which provides a breakdown of any receipts made into the system.



Both reports can be filtered by date range and other criteria, and as usual can be used to generate letters, tasks, SMS messages. You can also print or export these reports in the usual way.

Tariff import options

As standard the system will automatically assign 52 separate booking weeks ready for pricing, based on the changeover day specified.

However there may be a situation where you may want to record less booking periods, for example where there are large time spans with the same pricing in place.

This can be done easily now using the additional options to Add or Remove selected date ranges. The dates themselves can be adjusted by clicking into the Start date and amending accordingly.

The screenshot shows the 'Holiday Manager : Band Price' window. At the top, the 'Band Name' is 'Seaview Cottage'. Below it, there are radio buttons for 'Short Break' (selected) and 'Daily Charge'. The 'Year' is set to '2013' and the 'Changeover Day' is 'Saturday'. The main part of the window is a table with the following columns: Start Date, Short Break, Week Price, Min Short Charge, and Calendar Notes. Each row represents a week, with a 'Short Break' checkbox and 'Add'/'Remove' links. At the bottom, there are fields for 'Import From Previous Year' (with a right arrow), 'Apply Price Increase %' (0.00), and 'Fixed Amount' (0.00). There are also 'Print', 'Cancel', and 'Save' buttons.

Start Date	Short Break	Week Price	Min Short Charge	Calendar Notes		
29/06/2013	<input checked="" type="checkbox"/>	495.00	0.00		Add	Remove
06/07/2013	<input checked="" type="checkbox"/>	500.00	0.00		Add	Remove
13/07/2013	<input checked="" type="checkbox"/>	510.00	0.00		Add	Remove
20/07/2013	<input checked="" type="checkbox"/>	500.00	0.00		Add	Remove
27/07/2013	<input checked="" type="checkbox"/>	895.00	0.00		Add	Remove
03/08/2013	<input checked="" type="checkbox"/>	900.00	0.00		Add	Remove
10/08/2013	<input checked="" type="checkbox"/>	905.00	0.00		Add	Remove
17/08/2013	<input checked="" type="checkbox"/>	900.00	0.00		Add	Remove
24/08/2013	<input checked="" type="checkbox"/>	905.00	0.00		Add	Remove
31/08/2013	<input checked="" type="checkbox"/>	900.00	0.00		Add	Remove
07/09/2013	<input checked="" type="checkbox"/>	450.00	0.00		Add	Remove
14/09/2013	<input checked="" type="checkbox"/>	500.00	0.00		Add	Remove
21/09/2013	<input checked="" type="checkbox"/>	505.00	0.00		Add	Remove
28/09/2013	<input checked="" type="checkbox"/>	500.00	0.00		Add	Remove
05/10/2013	<input checked="" type="checkbox"/>	495.00	0.00		Add	Remove
12/10/2013	<input checked="" type="checkbox"/>	480.00	0.00		Add	Remove
19/10/2013	<input checked="" type="checkbox"/>	620.00	0.00		Add	Remove
26/10/2013	<input checked="" type="checkbox"/>	475.00	0.00		Add	Remove

When setting up the following year prices, clicking the Import from Previous Year option at the bottom of the page, will automatically retain the same date periods, but amend the start date to the nearest available changeover day.