

HLS Holiday Manager Software Manual

Word Processing & Merge Codes

Last Updated - 10th May 2013

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Introduction

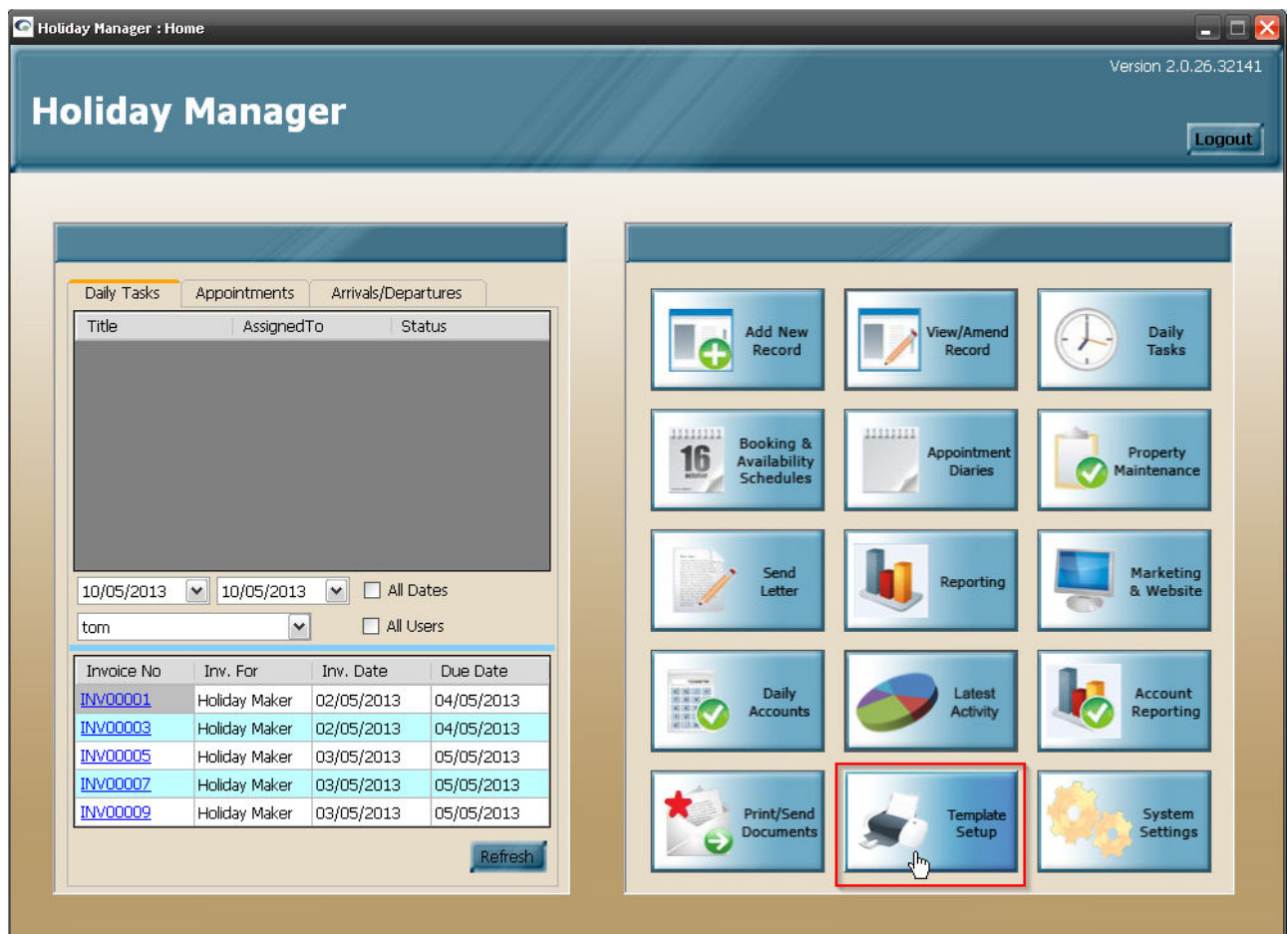
The Word Processing feature within the program has been designed to provide agents with a quick and easy way to merge letters and emails to send out to their clients.

With the option to create standard letters for regular use, or basic one off correspondence, the word processing tool is a quick and easy solution for contacting clients.

For more advanced functionality and formatting of documents, merged letters can be exported to Microsoft Word, or any other compatible word processing program.

Getting Started

Creating letters and setting up the system is done via the “**Template Setup**” button.



Clicking on this option will give you two menus for Letters and SMS text messaging. Within the Letter section, you have the following options:

New, Amendment, Automated and Default Setting.

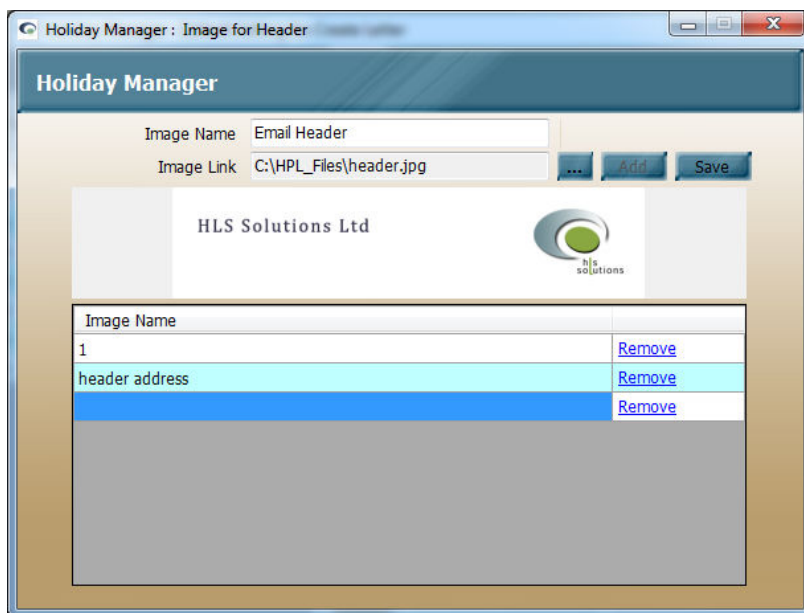
“New” and “Amendment”, are used to create and amend any standard templates respectively. The “Default Setting” will allow you to add Headers and Footers for use on letters and select the font size and style you wish to use. The “Automated Letter” option will allow you to set follow up reminders for any letters or emails you produce.

Default Setting

Add Header Image

Any number of headers can be saved on the system for use on different letters. The images are normally saved as a JPG image, and can be selected from a dropdown list when the letter is created.

Any image can be used; however a recommended size would be 175mm by 22mm at a quality of 150 dpi (dots per inch). Our team can assist with the creation of headers and footers if required. Simply send us the image you wish to use to support@hls-solutions.com, and we will provide assistance in getting this into the program successfully.



To add a header image into the program simply click the “Add” button to add a new line into the grid in the bottom half of the screen.

Click on the locate button, “...”, and browse to the location of the image file you wish to use and type a suitable image name.

Once done, click “Save” to save these details. Repeat as required to create as many headers as you wish to setup.

By clicking on the lines in the bottom grid a preview of your header can be viewed on the screen.

Add Footer Image

The footer image works in exactly the same way as the header image, simply appearing at the bottom of all screens when selected to appear.

To add a footer image, simply follow the steps detailed above for the header image.

Again if required, please feel free to forward a copy of the footer to a member of our team for them to assist.

Add Body Image

There will be some occasions where a header and footer will not be suitable for the document you are trying to create. For example you may wish to use a logo that extends throughout the whole page, or a background image that is larger than a standard header. For this occasion we have the option to create a Body Image, which is simply an image file that sits behind your letter/email.

The dimensions for this image file should be approximately 7.25 inches width by 10.6 inches high.

The steps to add this are exactly the same as for the header and footer, and a member of our team will be happy to assist with this if required.

Font Selection

The font selection tool will allow you to select a default font size and style for use on your letters. This will pick up all fonts that are installed on your computer, and will therefore include any bespoke fonts you may have installed.

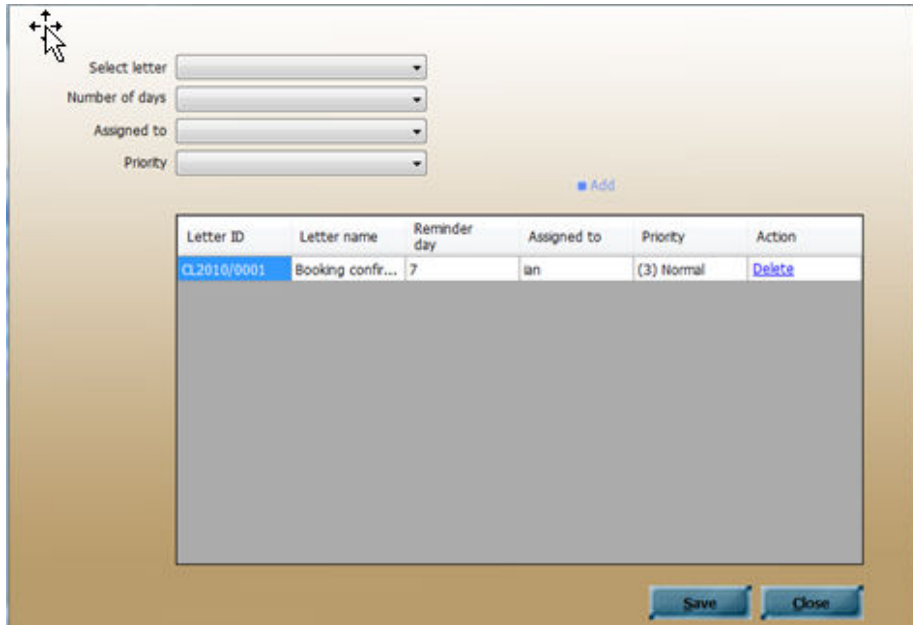
Once you have selected your choice of fonts simply click **“OK”** to save.

Automated Letter

The Automated letter option is designed to create a follow up reminder as a daily task when a letter/email has been sent to a contact.

To create the automated event, click on the Select letter dropdown option and choose the document you wish to set a reminder on. Use the following drop down menus to select the number of days after the letter is produced the reminder is triggered, the person it is assigned to and the priority this task should be given. Click Add to move to grid and click on the Save button when complete.

When this letter or email is generated from the system a daily task will be added for the appropriate number of days after.

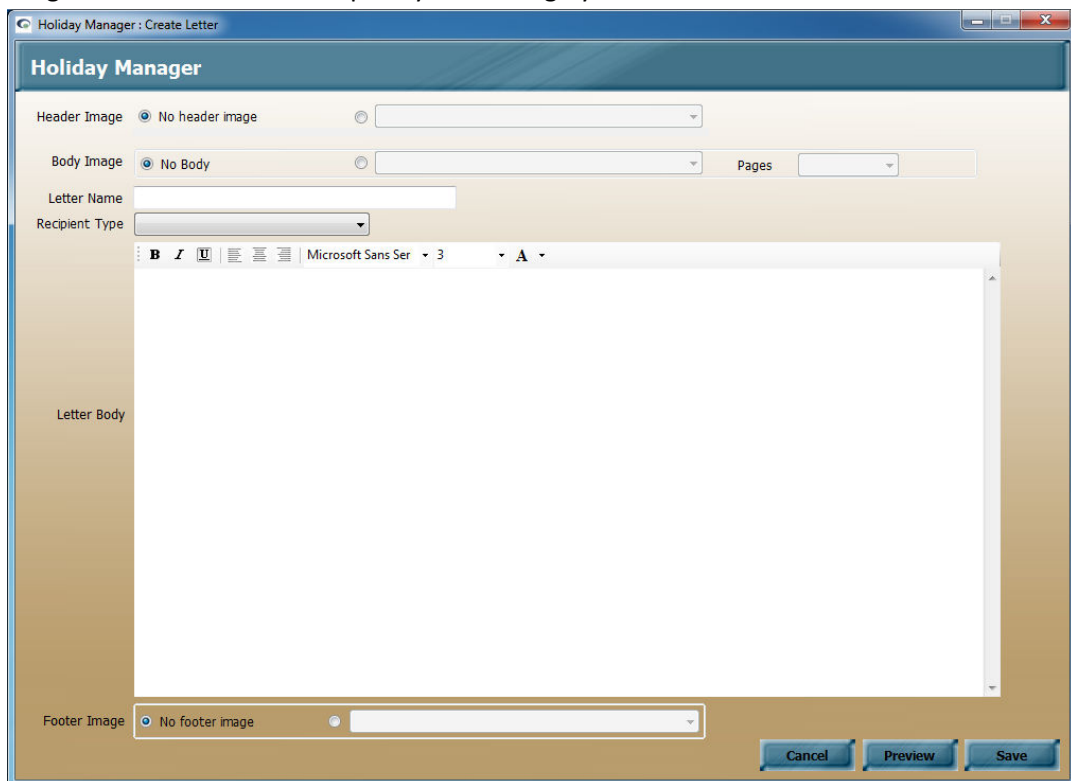


Creating and Amending Templates

Creating New Document

From the main screen click on the **“Template Setup”** button, then select **“New”** from the subsequent menu options.

The following screen will then come up for you to design your letter.



At the top of the screen you will have the option to select a header that will be included as default for this document.

All the headers you have setup will be available in the drop down list for you to select from, or you can simply leave as “No header image”, if no header is required.

You will have the option to include/exclude headers footers and body images from letters and emails as they are produced, how we setup the documents here is purely how they appear as a default.

You also have the option to choose a Body Image that you wish to be used as a default for this document. As above click in the radio button, and select the relevant image file from the dropdown list. You also have the option here to select whether this appears on just the 1st page of documents, or appears throughout the document.

The next field is the “Letter Name”. This is the name by which the letter will appear on all future menus and lists.

Next you need to indicate who the document will be receiving this. The “Recipient Type” is again selected by clicking on the dropdown list and selecting whether an Owner, Holidaymaker or Maintenance Company will be the recipient of this letter.

You are now able to create the content of your document by entering the relevant text into the “Letter Body” section.

Content can be copied and pasted from your existing documents and will retain the formatting of the original where possible. A limited amount of additional formatting can be done view the menu bar at the top of the Letter Body section.

In addition, merge codes can be used to pull through relevant information from within the program. For example instead of typing a property name every time, a code of #p_title would automatically populate the document with the relevant property name for the linked record.

A full list of the codes available for your documents can be found at the end of this manual, or in the separate “Merge Codes” manual.

At the bottom of this page is the option to select a Footer Image that will appear as default for this document.

Once you are happy with your letter, you can preview the layout, save the letter or cancel to return to the previous menu without saving.

Once saved, documents can be amended permanently by using the “Amend Existing Letter” option, or can be amended on a one off basis as you are merging to send out, as detailed in the “Send Letter” section later in this manual.

Useful tip

Rather than create a new document template from scratch, you can simply choose to amend an existing similar letter and then save this as a new copy. This will save you having to enter all of your merge codes again.

Amending Existing Templates

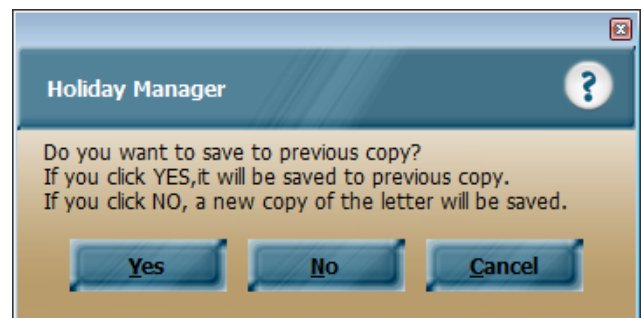
This option will be used for making permanent changes to a created letter. For a one off change to a document, see the **“Send Letter”** section below. You can however make changes to a letter template and choose to save a new copy of the letter, retaining your original.

From the main screen click on the **“Template Setup”** button, then select **“Amendment”** from the subsequent menu options.

You will then be presented with a list of your previously created document templates. To find the document you require, search options are available on the left hand side of the screen. The displayed order can also be changed by simply clicking on the column headers. Once you have found the document you wish to amend simply select this by clicking on the blue underlined **“Letter ID”** from the left hand column.

This will bring up a very similar screen to the **“Create Letter”** option, and will allow you to make any changes required to the existing template.

Once you have completed the changes to your letter, clicking **“Save”** will give you the option to overwrite your existing letter by clicking **“Yes”**, or create a new letter by clicking **“No”**. This feature allows you to create new letters from existing templates, rather than have to create from scratch.



Please note: If you have made changes to a letter and click on close, you will be prompted that the letter has changed and given the option to save these changes. This will overwrite the existing template, and you will not be given the option to save a new copy of the letter. If this is not what you are intending to do, press **“Cancel”** to return to the letter and use the **“Save”** option.

Sending Letters and Emails

Send Letter

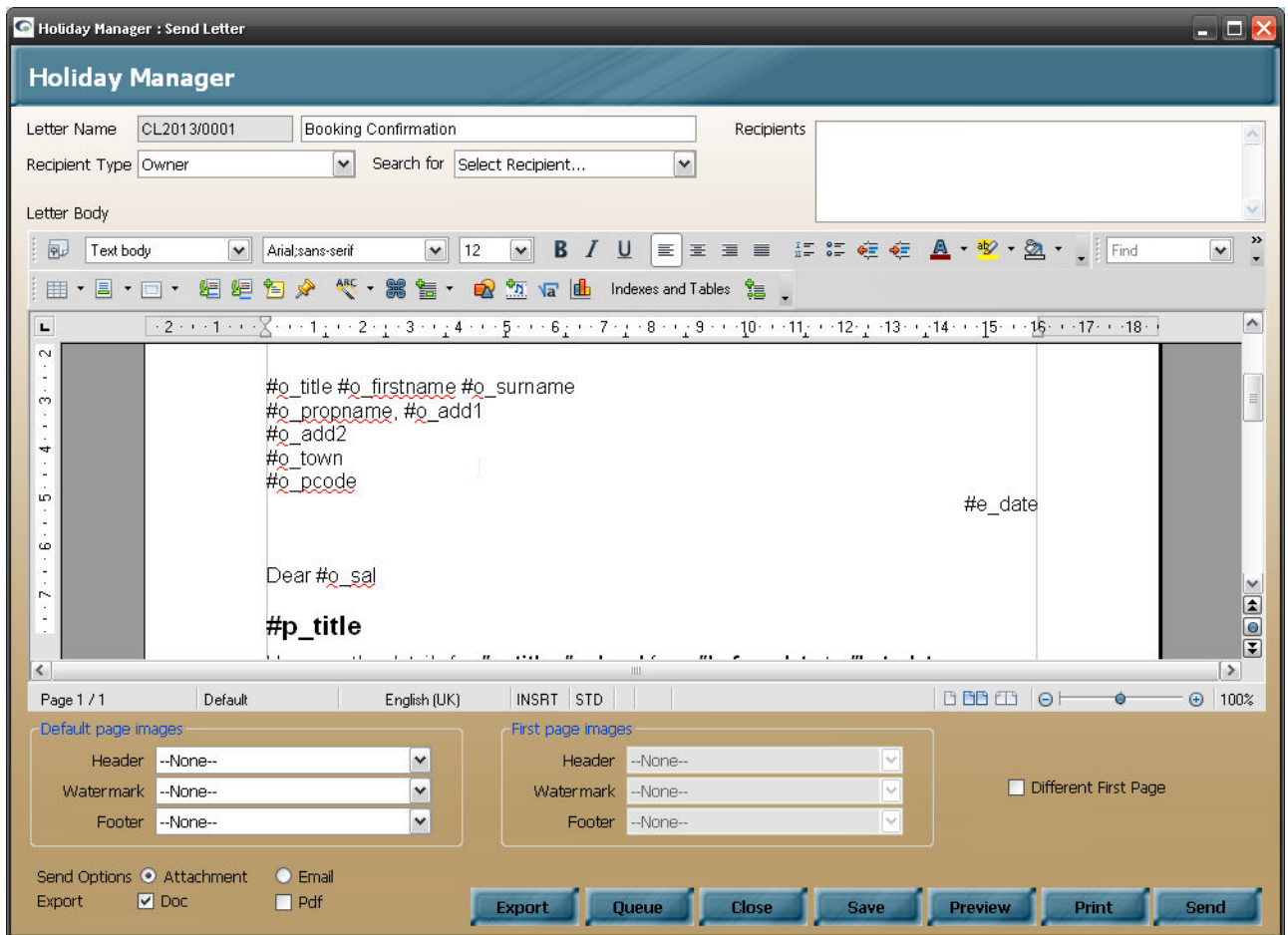
The send letter option is used to create merged letters and emails to send out to individuals or to groups of clients. This can include Owners, Properties, Holidaymakers, Maintenance Companies, or will allow input of a “one-off” recipient not stored on the system.

The “**Send Letter**” button is accessible from the main menu, and when clicked will present you with a list of all of your current saved document templates.



To open a document simply click on the blue underlined link in the left hand column, entitled “Letter ID”. To narrow down a letter selection there are a list of search criteria on the left hand side of the screen or the heading titles can be clicked on to change the search order.

Once you have selected the document you wish to send, you have the option to configure your document, select your recipient(s) and choose how this is going to be sent.



At the bottom of the screen you have the option to make changes to the header or body image for the document. This will pick up the default settings for this document, but can be changed at this point as required. Similarly at the bottom of the screen the footer image can also be amended if required, and there is an additional option for emails to select whether this is sent as a PDF attachment to your email, or merged into the body of your email.

The Letter Name and Letter ID provide you with information on the document you have selected, and the “To” box will show the recipients, once specified.

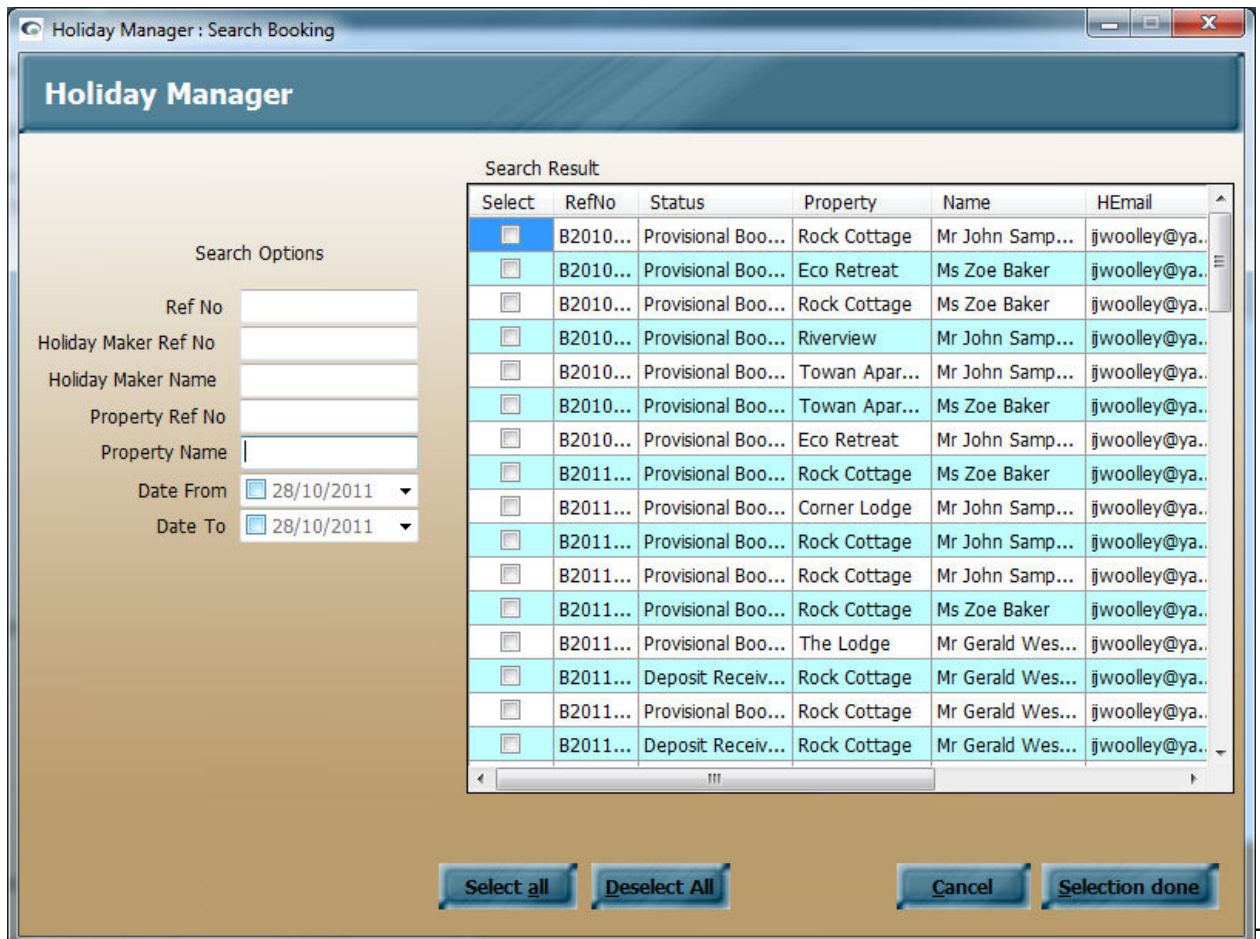
The Recipient Type will show which record is intended as the recipient of this letter, whether this is for the Holidaymaker, Owner, Maintenance Company etc.

All these fields will have already been populated by default, and no input will normally be required. We do however need to choose who we want to send the document to, which is where the Select Recipient dropdown is used.

Clicking here will present you with the relevant options for the Recipient type selected. For example if we have an owner letter, we will have the option to select from a list of owners, properties or bookings. For a holidaymaker we only have the option to select from the holidaymaker or bookings.

This is important, as a letter to a holidaymaker that contains details of the property and booking they have made will only be produced correctly if you have chosen booking rather than holidaymaker. Likewise if you are sending a letter to an owner who has several properties, you must select the property, rather than the owner from the list.

When you have chosen the relevant option, you will be presented with a list of the available records. You have a number of search options on the left hand side of the screen to help locate the record(s) you are looking for; you can also click on the headings to sort the data by column.



To send to a single recipient, click on the **“Select”** tick box in the furthest left hand column.

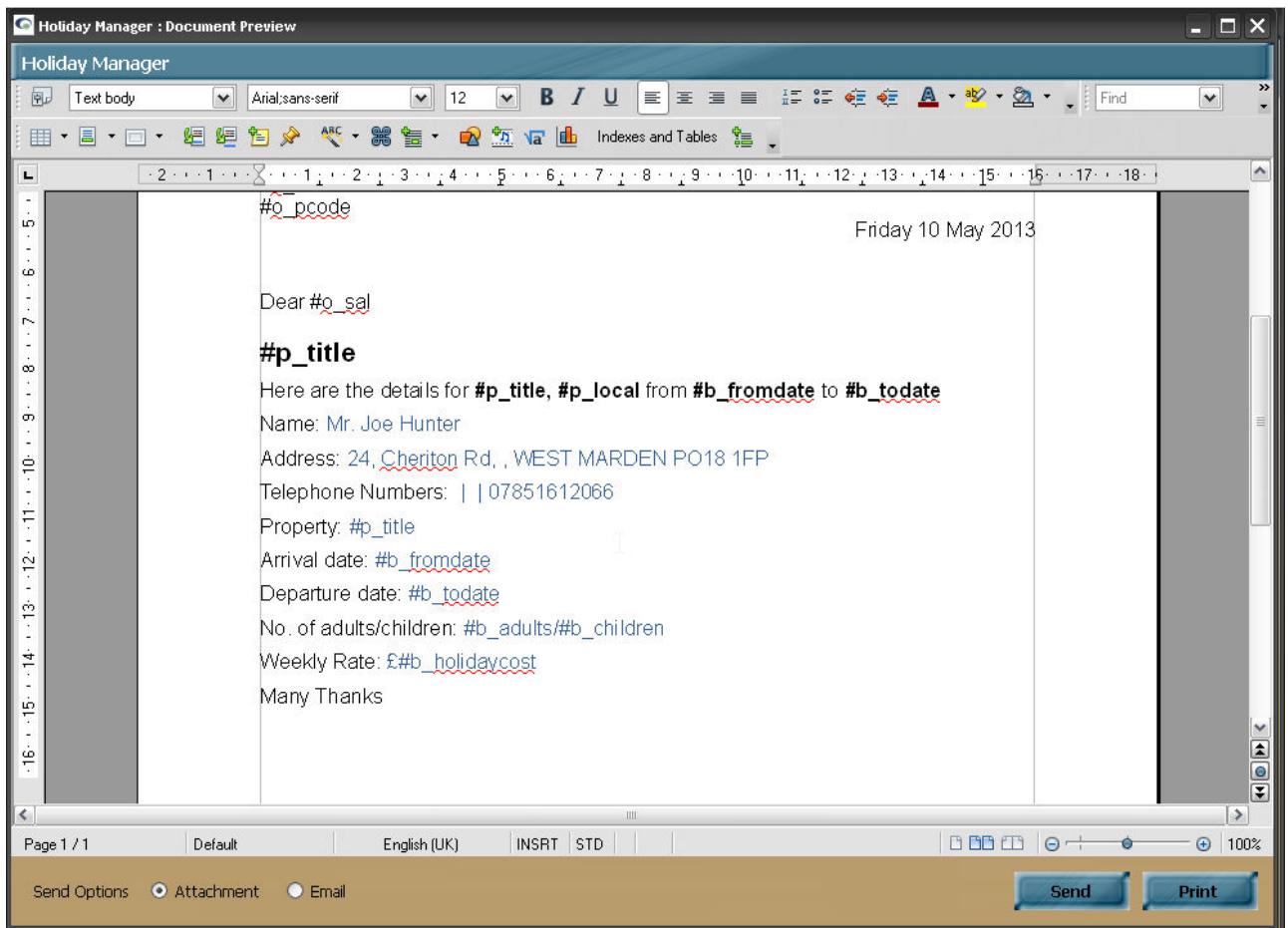
To choose multiple recipients simply tick on the select box for all required, or click the **“Select all”** button at the bottom of the screen.

Once you are happy with your selection of recipients click the **“Selection Done”** button.

At this stage, if you are happy with the letter template, you can choose to simply **“Print”** or **“Send”** by clicking on the relevant buttons, which will print the letter to the default printer, or send a copy of the letter via email. Alternatively, selecting **“Preview”** will bring up a copy of the merged letter for you to view and make any amendments to your merged letter before sending.

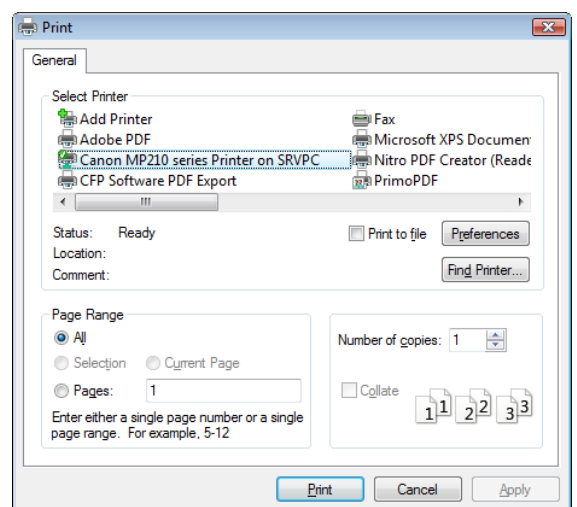
If you wish to add your merged letter to a queue to print/send later, clicking on the “Queue” option will add your merged letter(s) to the Print/Send document section where they can be viewed and printed as required.

From the **Preview** screen, you have the option to view the merged letter, clicking on the Edit tab at the top of the screen will also allow you to make any changes required before this is sent.



From the top toolbar, you have the some additional options including the print icon, which will bring up a “Windows Print Dialogue box” providing you with options on your chosen printer, number of copies, print quality etc.

You also have the option to click on the disk icon to allow you to export your letter in different formats. These include Excel, PDF and Word and will allow you access to your merged documents outside of the Holiday Manager program.



Merge Codes

Introduction

Rather than type all of the information in manually for letters, codes can be used that will automatically insert required information into every letter. For example, on a standard letter to an owner, rather than manually typing in the owner's first name every single time, we would use a code "#o_firstname", which would automatically insert the first name of the owner who we are writing to.

The merge codes are split into Owner, Property, Holidaymaker, Booking, Maintenance Company and Company/System fields and are in the format of #prefix_fieldname.

Owner Fields

Field	Prefix Code	Translation
RefNo	#o_ref	Owner Reference Number
Title	#o_title	Owner Title
FName	#o_firstname	First Name
Surname	#o_surname	Surname
Salutation	#o_sal	Salutation
HouseName	#o_propname	House Name or Number
AddressL1	#o_add1	Owner Address 1
AddressL2	#o_add2	Owner Address 2
Town	#o_town	Town
County	#o_county	County
Postcode	#o_pcode	Postcode
Country	#o_country	Country
Notes1	#o_notes1	Notes field one
Notes2	#o_notes2	Notes field two
HomePhone	#o_homephone	Home telephone number
WorkPhone	#o_workphone	Work telephone number
MobTel	#o_mobile	Mobile Number
Email1	#o_email1	Email Address1
Email2	#o_email2	Email Address2
Email3	#o_email3	Email Address3

AccountName	#o_accname	Bank Account Name
AccountNo	#o_accno	Account Number
BankReferenceNo	#o_bankref	Bank Reference Number
SortCode	#o_scode	Sort Code
BankName	#o_bname	Bank Name
BankBranch	#o_bbranch	Branch Name
BankAddressL1	#o_badd1	Bank Address Line one
BankAddressL2	#o_badd2	Bank Address Line two
BankTown	#o_btown	Bank Town
BankCounty	#o_bcounty	Bank County
BankPostCode	#o_bpcode	Bank Postcode
BankCountry	#o_bcountry	Bank Country
OverseasCorrespondenceName	#o_ocode	Overseas Correspondence Name
OsCAddressL1	#o_oadd1	Overseas Address line one
OsCAddressL2	#o_oadd2	Overseas Address line two
OsCTown	#o_otown	Overseas town
OsCCounty	#o_ocounty	Overseas County
OsCPostcode	#o_opcode	Overseas Postcode
OsCCountry	#o_ocountry	Overseas Country
FicoRef	#o_fico	Overseas fico reference number
MaintenProv1	#o_main1	Maintenance Company 1
MaintenProv2	#o_main2	Maintenance Company 2
MaintenProv3	#o_main3	Maintenance Company 3
MaintenProv4	#o_main4	Maintenance Company 4
MaintenProv5	#o_main5	Maintenance Company 5

Property Fields

Field	Prefix Code	Translation
RefNo	#p_ref	Property Reference Number
PropName	#p_title	Property Name
Locality	#p_local	Locality
Street Name	#p_no	Property Name or Number

AddressL1	#p_add1	Address line one
AddressL2	#p_add2	Address line two
Town	#p_town	Town
County	#p_county	County
Postcode	#p_pcode	Postcode
Country	#p_country	Country
PropPhone	#p_phone	Property Phone Number
WebLink	#p_web	Web Link for Property
Note2	#p_nt1	Notes field two
Note3	#p_nt2	Notes field three
Directions	#p_direct	Directions
CommisionRate	#p_comm	Commission Rate
ChangeOverDay	#p_change	Changeover Day
BrocRef	#p_broref	Brochure Reference
BrocPageNo	#p_bropag	Brochure Page Number
AdDescription	#p_addesc	Advertising description
MktDescription1	#p_markdesc1	Marketing Description
MktDescription2	#p_altmarkdesc	Alternative Marketing Description
ManagementDate1	#p_date1	User Definable Date 1
ManagementDate2	#p_date2	User Definable Date 2
ManagementDate3	#p_date3	User Definable Date 3
ManagementDate4	#p_date4	User Definable Date 4
ManagementDate5	#p_date5	User Definable Date 5
ManagementDate6	#p_date6	User Definable Date 6
ManagementDate7	#p_date7	User Definable Date 7
ManagementDate8	#p_date8	User Definable Date 8
UtilityProvider1	#p_utility1	Utility Company 1
UtilityProvider2	#p_utility2	Utility Company 2
UtilityProvider3	#p_utility3	Utility Company 3
UtilityProvider4	#p_utility4	Utility Company 4
UtilityProvider5	#p_utility5	Utility Company 5
MaintenProv1	#p_main1	Maintenance Provider Reference Number1
MaintenProv2	#p_main2	Maintenance Provider Reference Number2

MaintenProv3	#p_main3	Maintenance Provider Reference Number3
MaintenProv4	#p_main4	Maintenance Provider Reference Number4
MaintenProv5	#p_main5	Maintenance Provider Reference Number5

Holidaymaker Fields

Field	Prefix Code	Translation
RefNo	#h_ref	Holiday Maker reference
Title	#h_title	Title
FName	#h_firstname	First Name
Surname	#h_surname	Surname
Salutation	#h_sal	Salutation
HouseName	#h_addname	House name/no
AddressL1	#h_add1	Address line one
AddressL2	#h_add2	Address line two
Town	#h_town	Town
County	#h_county	County
Postcode	#h_pcode	Postcode
Country	#h_country	Country
Age	#h_age	Age
Notes	#h_notes1	General Information notes
DayTel	#h_telday	Home telephone number
EveTel	#h_televe	Work telephone number
MobTel	#h_mobile	Mobile Number
Email1	#h_email1	Email address 1
Email2	#h_email2	Email address 2
Email3	#h_email3	Email address 3
CompanyName	#h_companyname	Company Name

Booking Fields

Field	Prefix Code	Translation
Booking ID	#b_id	Booking reference
Booking Status	#b_status	Current booking status

Booking start date	#b_fromdate	Start date of the booking
Booking end date	#b_todate	Booking end date
Any booking extras	#b_extra	Extras specified
Payment Method	#b_paymentmethod	Payment method
Extra Amount	#b_eamount	Amount of any extras
Holiday cost	#b_holidaycost	Total holiday cost
Discount Code	#b_discountcode	Any discount codes applied
Deposit due	#b_depositof	Amount of the deposit due
Balance payment due	#b_balanceof	Amount of the balance payment due
Deposit due date	#b_depositduedate	Date deposit due
Balance due date	#b_balanceduedate	Date balance due
Total amount due	#b_totaldue	Full amount of the booking
Booking notes	#b_bookingnote	Booking notes for Agent
Guest Notes	#b_guestnote	Booking notes for Guest
Owner Notes	#b_ownernote	Booking notes for Owner
Maintenance Notes	#b_maintenancenote	Booking notes for Maintenance company
Booking Nights	#b_nights	Number of nights
Total Guests	#b_partytotal	Total number of guests
Adult guests	#b_adults	Number of adults
Children	#b_children	Number of children
Infants	#b_infants	Number of infants
Unavailable To Date	#b_unavailabletodate	Unavailable To Date
Unavailable From Date	#b_unavailablefromdate	Unavailable From Date
Deposit Returned Date	#b_depredate	Deposit Returned Date
Deposit Returned Notes	#b_deprenotes	Deposit Returned Notes
Card Surcharge Amount	#b_surchargeamount	Amount of Card Surcharge
UnavailableNights	#b_unavailablenights	Time Property is Unavailable
AllBookingItems	#b_allbookingitems	Table with all invoice items
BookingExtras	#b_bookingextras	Booking Extras
RefNo	#mc_ref	Cleaner reference Number
CompanyName	#mc_coname	Company Name
ContactName	#mc_Contact	Contact Name
CompanyAddressL1	#mc_add1	Address line one

CompanyAddressL2	#mc_add2	Address line two
Town	#mc_town	Town
County	#mc_county	County
Postcode	#mc_pcode	Postcode
Country	#mc_country	Country
Notes	#mc_notes	General Information Notes
MobileNumber1	#mc_mob	Mobile Phone Number
ContactNumber1	#mc_tel1	Contact Number 1
ContactNumber2	#mc_tel2	Contact Number 2
Email1	#mc_email1	Email address 1
Email2	#mc_email2	Email address 2
Email3	#mc_email3	Email address 3
RefNo	#ca_ref	Caretaker reference Number
CompanyName	#ca_coname	Company Name
ContactName	#ca_Contact	Contact Name
CompanyAddressL1	#ca_add1	Address line one
CompanyAddressL2	#ca_add2	Address line two
Town	#ca_town	Town
County	#ca_county	County
Postcode	#ca_pcode	Postcode
Country	#ca_country	Country
Notes	#ca_notes	General Information Notes
MobileNumber1	#ca_mob	Mobile Phone Number
ContactNumber1	#ca_tel1	Contact Number 1
ContactNumber2	#ca_tel2	Contact Number 2
Email1	#ca_email1	Email address 1
Email2	#ca_email2	Email address 2
Email3	#ca_email3	Email address 3

Maintenance Company Fields

Field	Prefix Code	Translation
RefNo	#m_ref	Maintenance Company reference Number

CompanyName	#m_coname	Company Name
ContactName	#m_Contact	Contact Name
CompanyAddressL1	#m_add1	Address line one
CompanyAddressL2	#m_add2	Address line two
Town	#m_town	Town
County	#m_county	County
Postcode	#m_pcode	Postcode
Country	#m_country	Country
Notes	#m_notes	General Information Notes
MobileNumber1	#m_mob	Mobile Phone Number
ContactNumber1	#m_tel1	Contact Number 1
ContactNumber2	#m_tel2	Contact Number 2
Email1	#m_email1	Email address 1
Email2	#m_email2	Email address 2
Email3	#m_email3	Email address 3
AccountName	#m_accname	Bank Account Name
AccountNumber	#m_accno	Account Number
BankReferenceNo	#m_bankref	Bank Reference Number
SortCode	#m_scode	Sort code
BankName	#m_bname	Bank Name
BankBranch	#m_bbranch	Bank branch
BankAddressL1	#m_badd1	Bank Address 1
BankAddressL2	#m_badd2	Bank Address 2
BankTown	#m_btown	Bank Town
BankCounty	#m_bcounty	Bank County
BankPostCode	#m_bpcode	Bank Postcode
BankCountry	#m_bcountry	Bank Country

Company and System Fields

Field	Prefix Code	Translation
CompanyName	#c_name	Company Name
AddressL1	#c_add1	Address line one

AddressL2	#c_add2	Address line two
Town	#c_town	Town
County	#c_county	County
PostCode	#c_pcode	Postcode
Country	#c_country	Country
CompanyTelephone	#c_phone	Telephone number
CompanyFax	#c_fax	Fax Number
CompanyEmail	#c_email	Email address
CompanyWeb	#c_web	Web address
BANK_ACCOUNT_NAME	#c_accname	Bank Account Name
BANK_ACCOUNT_NO	#c_accno	Account Number
BANK_REF_NO	#c_bankref	Bank Reference
BANK_SORT_CODE	#c_scode	Sort code
BANK_NAME	#c_bname	Bank Name
BANK_BRANCH	#c_bbranch	Bank branch
BANK_ADDRESS_L1	#c_badd1	Bank Address 1
BANK_ADDRESS_L2	#c_badd2	Bank Address 2
BANK_TOWN	#c_btown	Bank Town
BANK_COUNTY	#c_bcounty	Bank County
BANK_POST_CODE	#c_bpcode	Bank Postcode
BANK_COUNTRY	#c_bcountry	Bank Country
VAT_NO	#c_vat	Vat Number
VATRATE	#c_vatrate	Vat Rate (%)
Title	#c_utitle	User Title
FName	#c_user	User first name
Surname	#c_surname	User Surname
JobTitle	#c_Job	Job Title
HomePhone	#c_uphone1	User Home Phone
WorkPhone	#c_uphone2	User Work Phone
MobilePhone	#c_umobile	User Mobile Number
Email	#c_uemail	User Email
	#e_date	Today's Date

