

# HLS Solutions Ltd Update Notes

# Version 2.0.25

Last Updated – 28<sup>th</sup> January 2013

#### **HLS Solutions Limited**

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

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### **Version Summary**

Welcome to the latest version of the HLS Holiday Manager software. Below you will find information on the changes that have been introduced for the latest release of the program, version **2.0.25**.

The main features included in this version are:

- New Schedule View
- New Marketing Email feature
- Additional web link stored for each property, with corresponding merge code
- Additional History and Latest Activity functionality
- Option to add your own Header and Footer for booking form/initial invoice
- New status and search options for owners
- Option to include/exclude items from Make New Payments screen
- New technical option within the Database configurator for SQL database queries

#### **New Schedule View**

Introduced in this version, we have introduced a new Schedule View, which allows you to view at a glance what bookings are coming up, and which properties have gaps in their booking schedule:

To bring up the Schedule View, click on the Booking & Availability Schedules button:



From the following screen, you can see the two new options that have been included for this version - Email and Schedule View:

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		P2010/0001	The Lodge	Portreath	Lodge	6	3	test	Saturday
28/01/2013 👻		P2010/0002	Towan Ap	Hayle Tow	Apartment	3	1	Band 1	Friday
28/01/2013 🔻		P2010/0003	Rock Cott	Mevagissey	Detached	8	3	The Cotta	Sunday
		P2010/0004	Eco Retreat	St Ives	Detached	10	5	Seaview C	Saturday
		P2010/0005	Church View	Exeter	House	4	2	Band B	Saturday
		P2010/0006	Eden Reach	Falmouth	Cabin	4	1	Band B	Saturday
		P2010/0007	Treetops	Brixham	Detached	8	4	The Cotta	Saturday
		P2010/0008	Riverview	Helford River	House	4	2	Seaview C	Saturday
		P2010/0009	Primrose F	Bude	Detached	7	3	The Cotta	Saturday
		P2010/0010	Corner Lo	Tehidy	Lodge	6	3	Band B	Saturday
•		P2010/0011	Lobster Pots	The Lizard	Flat	2	1	Band 1	Saturday
		P2012/0001	Sycamore	West Town	Apartment	2	1	Band B	Saturday
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Name	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27
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Sycamore House																															

Click on the Schedule View button to bring up the Schedule View screen:

At the top of the screen the date range will cover the next month period commencing on today's date. This can be amended by clicking the calendar in the top left corner and selecting the new start date. The bookings are colour coded, as per the specification in the System Settings section. The colour key for the booking status can be viewed at the bottom of the screen in the Colours Definition section.

Currently there are no options to click and obtain further booking information for each booking, however this can be easily viewed from the standard Booking Availability screen.

#### **New Marketing Email feature**

In addition to the new Schedule View, you will have noticed we have also added a new Email option on the Booking Availability screen.

This option allows us to select a number of properties and send via email to a prospective guest.

To generate the email, select the properties you wish to include by clicking on the Select tick box to the side of the property. Once you are happy with your selection, click on the Email button to generate the email screen:

Select	C	ch Option	-								
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The email screen will provide a standard covering paragraph, complete with your contact telephone number. It will also contain an overview of the marketing information for the selected properties.

Before sending you have the option to make any amendments to the text formatting or email content as required:

CC						
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		Dearoon	1	Child Friendly	No	
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Once you are happy with the text content and style, add the recipient email into the "To" field at the top of the screen, plus an additional "CC" email address if required. If you wish to send your email to multiple recipients, simply add the additional recipient email addresses separated by a ",".

Click on the Send button to generate the email.

The recipient will receive the email including the default marketing image for each property, as shown below:

rmation, please do not he				y requirements. If you would like any further
van Apartments   Hayle To	wans   OI765			
A filment	Full Description			
1 1	Sleeps 3	Bedroom 1	Child Friendly	No
The sealty la	Price Band	Band 1	Pet Friendly	No
	Changeover Day	Friday	Sea Views	Yes
	Short Breaks	Available	Garden	No

You will notice as well an underlined link marked "Full Description". This is a new field that we have introduced for this version to add in a web link for each property. When clicked, this will open the designated web page for this property.

The web link for each property can be setup via the Property screen, as detailed below:

### **New Property Web Link**

In order to help with marketing, we have now introduced a space to put a unique web URL for each property. We have also created a new merge code, so this can be automatically added into letters, emails and other documentation.

To add this in, click on the View/Amend record and locate the relevant property and select the Marketing Information tab.

As shown in the screen below, we have a new field called Web address. Add in the unique URL for this property, or the link to the page you want opened when the relevant link is clicked.

Holid	ay Manager :	Property View/Ed	it			>								x
Holi	iday Ma	nager		Property N	ame: The Lo	odge				Sta	tus: LIV	/E		•
Genera	al Marketi	ng Information	Photographs	Maintenance	Management	Documentation	Keys	Transact	ions	History	Extras			
		Property Type	C	-				Heating	Full			•		
		Sleeps	6				P	rice Band	Continuent			-	٩	
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			Child Friendly		📃 Swim	ming Pool			Open I	Fire				
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**Please Note.** This field is currently limited to 50 characters. If your website link is in excess of 50 characters, you can use <u>www.bitly.com</u> or a similar web address shortener to reduce the number of characters in your link. Some of these web address shorteners can also be used to provide detailed analytics on who has clicked your link, enabling you to track your visitors and more popular properties.

The web link for each property can also be pulled into any documents by using the following merge code:

#p\_web

# History/Latest Activity functionality

In order to make it as simple as possible to track everything that happens in your office, we have made a number of improvements to the information we store in the History and latest Activity sections.

These changes include:

- Full details of any booking status changes, with a note of the new status
- Covering email content, plus any email attachments
- Copy of any marketing emails sent with recipients and properties included.

You will notice these changes both on the individual history record of each screen, plus via the Latest Activity button:

< 28/01/2013							
Date/Time	Event By	Event Of	Event Type	Description	Owner RefNo	Property RefNo	HolidayMa RefNo
28/01/2013 02:01 PM	ian	PLet2013/00	Letter	Ms Zoe Baker(PL2013/0001,,			H2010/00
28/01/2013 02:04 PM	ian			New holiday booking		P2010/0001	H2012/00
28/01/2013 02:06 PM	ian	REC00070		Monies received in		P2010/0001	H2012/00
28/01/2013 02:06 PM	ian		Change of bo	Change to Deposit Received		P2010/0001	H2012/00
28/01/2013 02:20 PM	ian			New holiday booking		P2010/0001	H2012/00
28/01/2013 02:20 PM	ian	REC00071		Monies received in		P2010/0001	H2012/00
28/01/2013 02:20 PM	ian		Change of bo	Change to Full Paid		P2010/0001	H2012/00
28/01/2013 02:21 PM	ian			New Unavailable period	02010/0001	P2010/0001	
28/01/2013 02:21 PM	ian			New holiday booking		P2010/0001	H2011/00
28/01/2013 02:21 PM	ian		Change of bo	Change to Cancelled		P2010/0001	H2011/00
28/01/2013 02:21 PM	ian		Cancelled boo	Booking Cancellation		P2010/0001	H2011/00
28/01/2013 02:22 PM	ian			New holiday booking		P2010/0002	H2012/00
28/01/2013 02:22 PM	ian	REC00072		Monies received in		P2010/0002	H2012/00
28/01/2013 02:22 PM	ian		Change of bo	Change to Full Paid		P2010/0003	H2012/00
28/01/2013 02:23 PM	ian			New holiday booking		P2010/0003	H2012/00
28/01/2013 02:23 PM	ian	REC00073		Monies received in		P2010/0003	<u>H2012/00</u>
28/01/2013 02:23 PM	ian		Change of bo	Change to Full Paid		P2010/0003	H2012/00
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As always, all the blue underlined references will open the relevant record, allowing you to easily jump to a booking or information screen to view the full details. If you click on an email which has attachments, the email will open in the main screen and the attachments will open in separate screens for your information.

## Add Header option for booking form/initial invoice

We have always been able to add a Header, Footer or a background image to the invoices, receipts and statements. As an additional option to this, we have also now amended the system to allow the same functionality for the Initial invoice/booking form. To access this, click on the System Settings, and select the Invoice Type tab.

From here, you can select via the dropdown menus whether you want a "Default" Layout, or the "HeaderFooter" Layout. The Default option will allow you to specify a watermark (background image) that will sit behind any text that appears on the page. This is really useful if you have a logo or header image that extends quite low down the page. If you select the "HeaderFooter" option, you have the choice to add a separate header and/or footer for all the accounts documentation.

G Holiday Manager : System Settings			
Holiday Manager			
Company Details General Settings C	Owner Property Holiday Maker Mainte	enance Company Price Bands Booking Inform	nation Extras Invoice Type System Events
Accounts Documentation			
Invoice Layout	HeaderFooter	Booking Layout	HeaderFooter
Watermark		Watermark	
Header Logo 🗹		Header Logo	✓ HLS Header
Footer Logo 🔽	Footer -	Footer Logo	▼ Footer ▼
Pages	Page 1   Preview	Pages	Preview
Receipt Layout	HeaderFooter	Statement Layout	HeaderFooter
Watermark		Watermark	
Header Logo 🔽		Header Logo	✓ HLS Header
Footer Logo 🔽		Footer Logo	✓ Footer
Pages	Page 1   Preview	Pages	Page 1   Preview
Invoice Type			
Description			
Owner			
Guest			
Maintenance			
			Add Type Close Save

There is no limit to the number of headers and Footers that you can create on the system, and each document can be setup independently.

To see how your header will look, each document has a Preview button, which will display a blank copy of the form with the options selected shown.

0	Holid	lay Manag	er: Boo	oking	Report	-	_	-		-	-	_	-	X
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#### New status and search options for owners

For version 2.0.25 we have introduced a new owner status of "Prospective", which can be used to track your potential owners. This enables you to create a marketing list of all the owners that you are trying to attract, through which you can track and send any marketing information and correspondence via the software.

Holiday	Manager : Owne	er View/Edit					
Holid	ay Manag	er	Owner: Pau			Status:	LIVE -
General	Account Info	Maintenance Providers	Properties Histo	ry Documentation	Transactions		LIVE PROSPECTIVE
		Dof No. 02010/0001					

Setting an Owner status is simply a matter of clicking the drop down Status menu at the top right hand corner of the Owner screen and selecting the Prospective option.

Prospective and Archive Owners will not appear automatically on your search results, making it easier to deal with your live records, but can be easily viewed by ticking the Show All Status tick box on the search screen.

A similar filter has been created on the Owner report as well, enabling targeted SMS, emails and other marketing to be sent just to this group of owners.

			Search Re	sult					
			Ref #	Fir	st Name	Surname	Status	Town	
			02010/0	001 Pa	ul	Reed	Prospective	Bristol	
			02010/0	002 Am	ny I	Bewick	Active	Bath	
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### **Additional Filter Options on Payment screens**

Within the software, some time ago we introduced the ability to filter payments you are making to your Owners, by selecting a date range or by selecting/deselecting individual statement transactions.

As this has proved to be a very useful addition to the accounting options within the system, we have therefore extended this to include other statement options.

These include the ability to filter by date for Agent Statements, Maintenance statements, Holidaymaker refund statements and Surcharge payments.

Holiday Man	ager : Make Ne	w Payment										
Holiday M	lanager											
New Paymen	t											
Payment To Agent 🗸		<ul> <li>Statement</li> </ul>	Statement Number		Auto		Statement Notes				*	
Ref No 1			Stateme	Statement Date		/01/2013	-					
HLS Holiday Homes Elmhurst,Treswithian Downs,UK			-	Statement Total		4470.02						-
							0.0.72)		-			
			Withheld Monies		0.00		0.00	Payment Method		•		
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								Invoice Date	28/01	1/2013 🔻 to	28/01/201	13 🔻
					-		1					
Booking To	Booking	Reference	Description	Credit	VAT	Include	Booking Date	Invoice Date	Booking From	Booking To	Booking	Reference
23/03/2013	B2013/0001	The Lodge	Managemen	37.50	7.5	0 🔽						
23/02/2013	B2013/0002	The Lodge	Managemen	156.75	31.8	5 🔽						
23/02/2013	B2013/0002	The Lodge	Booking Cha	20.00	0.0	0 🔽						
24/02/2013	B2013/0004	Towan Ap	Managemen	225.00	45.0	101 101 101 101 101 101 101 101 101 101						
24/02/2013	B2013/0004	Towan Ap	Booking Cha	20.00	4.0	12 CONTRACTOR						
13/02/2013	B2013/0005	Rock Cotta	Managemen	187.50	37.5							
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Alternatively we can also tick to Include/Exclude individual transactions as required.

#### **Database configurator options**

In order to aid with our support services, in this version we have introduced a new support tool to the Database Configurator. The "Run SQL Query" option will allow us to access your database where there are no appropriate Microsoft tools available.

This will not be used for everyday use, but rather will be purely for use under direction from a member of the HLS support team.