

# HLS Solutions Ltd Update Notes

## Version 2.0.25

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Specialists in software,  
website and design solutions  
for the holiday letting industry  
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**HLS Solutions Limited**  
Registered in England and Wales  
No. 07104476

## 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**.

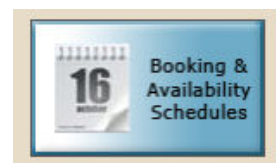
The main features included in this version are:

- 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:

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:

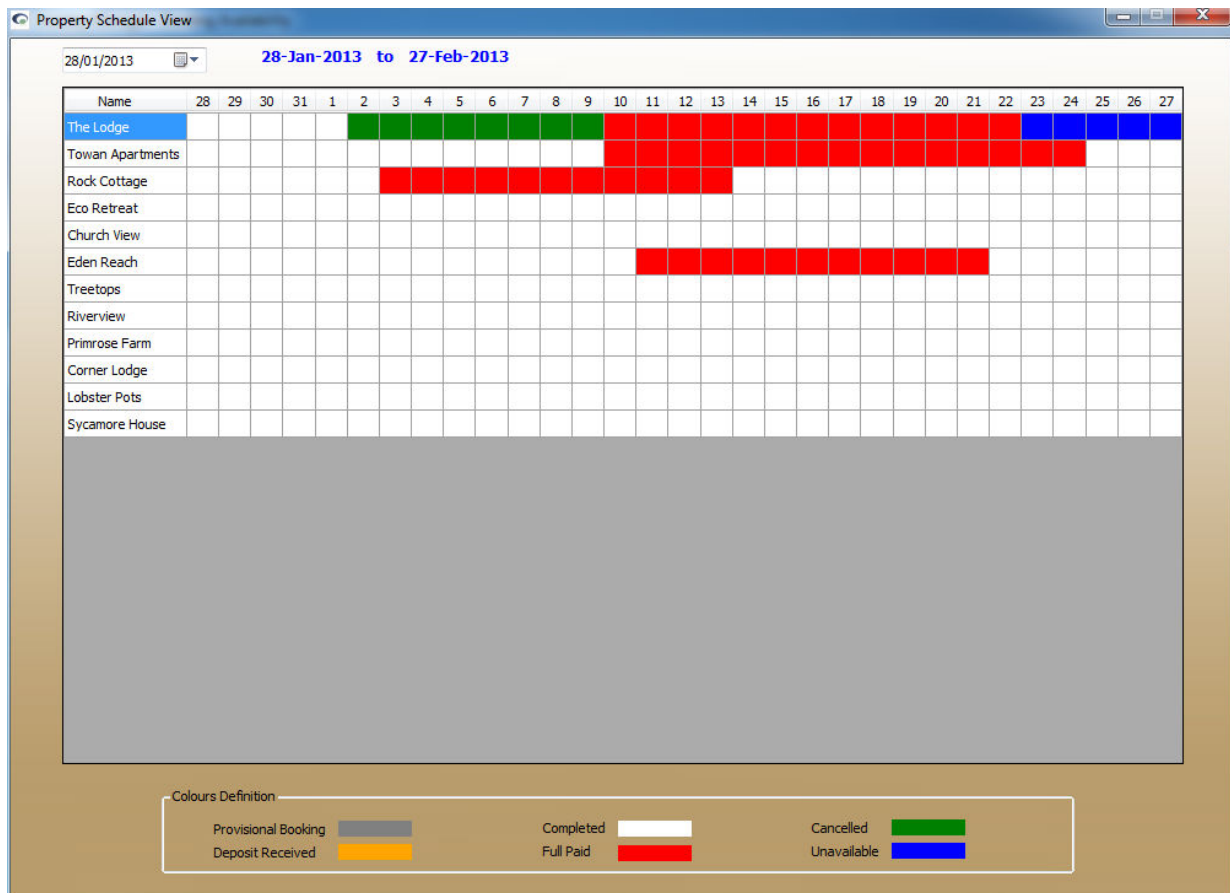
Property Name:

12 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
<input type="checkbox"/>	P2012/0001	Sycamore ...	West Town	Apartment	2	1	Band B	Saturday

Availability  Property Details

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:

**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:

12 records found

[Email](#) [Compare](#)

[Schedule View](#)

Availability  Property Details

Riverview

January

2013

January, 2013							February, 2013							March, 2013							April, 2013						
Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr
29	30	31	1	2	3	4	26	27	28	29	30	31	1	23	24	25	26	27	28	1	30	31	1	2	3	4	5
5	6	7	8	9	10	11	2	3	4	5	6	7	8	2	3	4	5	6	7	8	6	7	8	9	10	11	12
12	13	14	15	16	17	18	9	10	11	12	13	14	15	9	10	11	12	13	14	15	13	14	15	16	17	18	19
19	20	21	22	23	24	25	16	17	18	19	20	21	22	16	17	18	19	20	21	22	20	21	22	23	24	25	26
26	27	28	29	30	31	1	23	24	25	26	27	28	1	23	24	25	26	27	28	29	27	28	29	30	1	2	3
2	3	4	5	6	7	8	2	3	4	5	6	7	8	30	31	1	2	3	4	5	4	5	6	7	8	9	10

**Holiday Manager : Document Email**

### Holiday Manager

To:

CC:

Text body Times New Roman 12

Thank you for your enquiry, please find below a selection of properties that meet your holiday requirements. If you would like any further information, please do not hesitate to contact us on 0845 388 8635.

[Towan Apartments | Hayle Towns | OI765](#)

[Full Description](#)

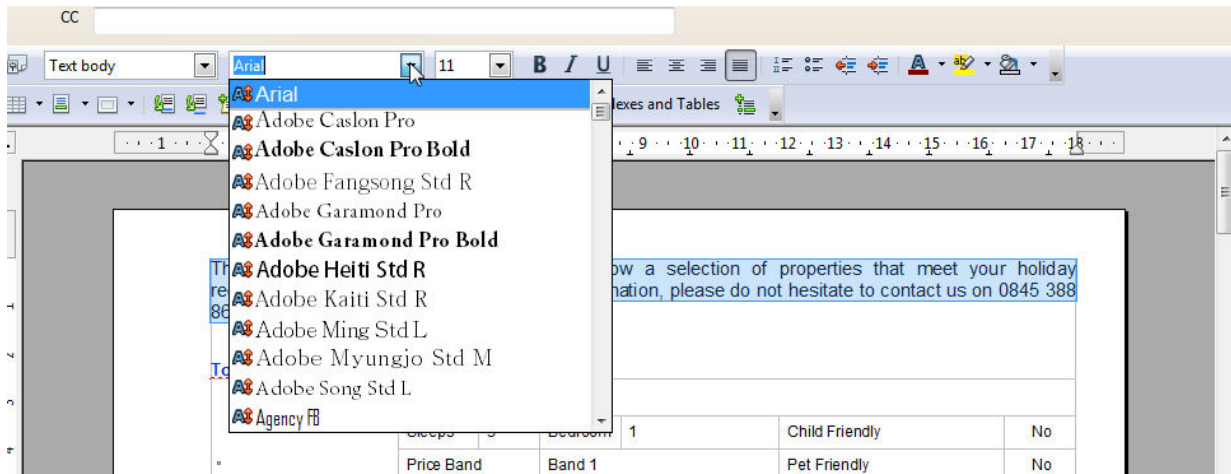
Sleeps	3	Bedroom	1	Child Friendly	No
Price Band	Band 1	Pet Friendly	No		
Changeover Day	Friday	Sea Views	Yes		
Short Breaks	Available	Garden	No		

Page 1 / 1 Default English (UK) INSRT STD 100%

[Send](#)

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:



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:

Thank you for your enquiry, please find below a selection of properties that meet your holiday requirements. If you would like any further information, please do not hesitate to contact us on 0845 388 8635.

[Towan Apartments | Hayle Towans | OI765](#)



[Full Description](#)

Sleeps	3	Bedroom	1	Child Friendly	No
Price Band	Band 1			Pet Friendly	No
Changeover Day	Friday			Sea Views	Yes
Short Breaks	Available			Garden	No

[Rock Cottage | Mevagissey | tres](#)

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.

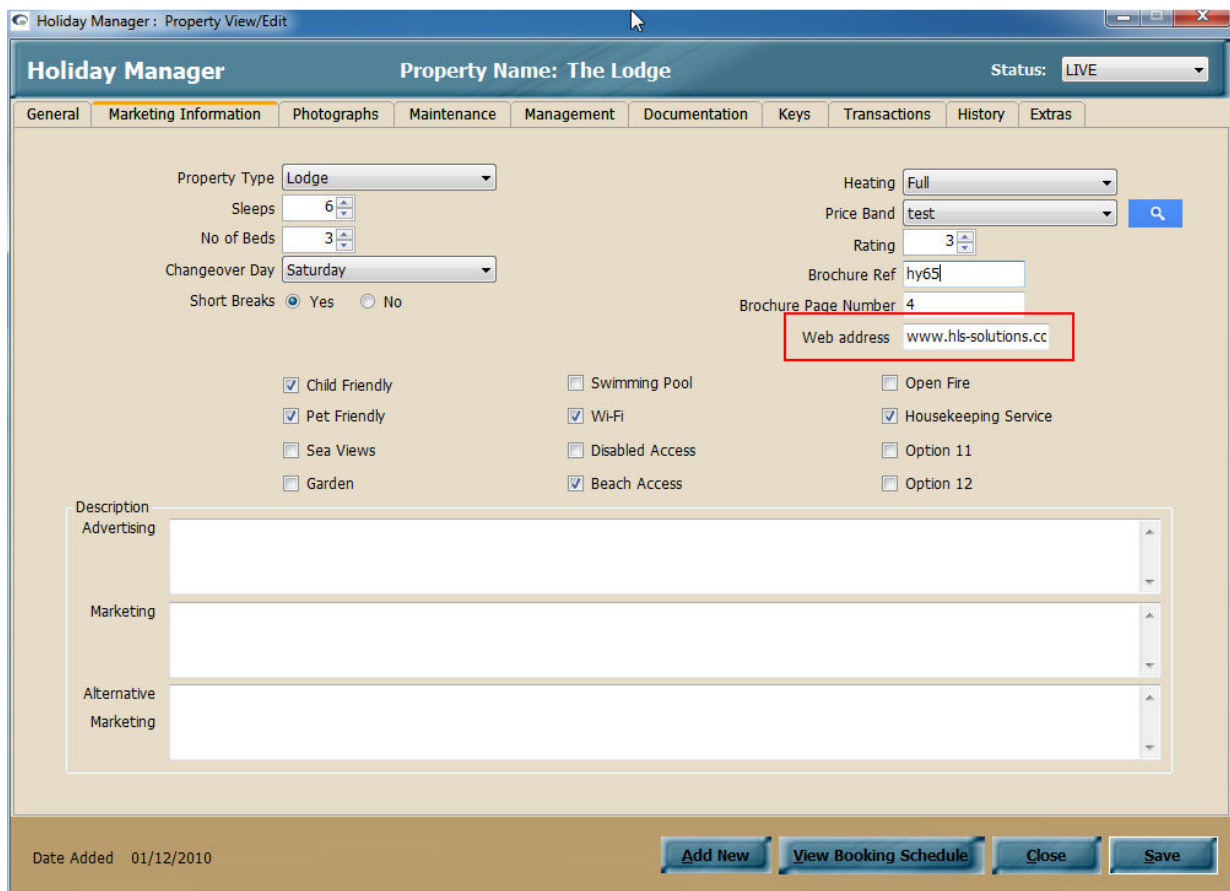
The web link for each property can be setup via the Property screen, as detailed below:

## 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.



The screenshot shows the 'Holiday Manager' software interface. The window title is 'Holiday Manager : Property View/Edit'. The main header displays 'Property Name: The Lodge' and 'Status: LIVE'. Below the header are several tabs: 'General', 'Marketing Information', 'Photographs', 'Maintenance', 'Management', 'Documentation', 'Keys', 'Transactions', 'History', and 'Extras'. The 'Marketing Information' tab is selected. The form contains various fields for property details:

- Property Type: Lodge
- Sleeps: 6
- No of Beds: 3
- Changeover Day: Saturday
- Short Breaks: Yes (selected), No
- Heating: Full
- Price Band: test
- Rating: 3
- Brochure Ref: hy65
- Brochure Page Number: 4
- Web address: www.hls-solutions.cc (highlighted with a red box)

There are also several checkboxes for amenities:

- Child Friendly
- Pet Friendly
- Sea Views
- Garden
- Swimming Pool
- Wi-Fi
- Disabled Access
- Beach Access
- Open Fire
- Housekeeping Service
- Option 11
- Option 12

At the bottom, there are three text areas for 'Description Advertising', 'Marketing', and 'Alternative Marketing'. The bottom status bar shows 'Date Added 01/12/2010' and four buttons: 'Add New', 'View Booking Schedule', 'Close', and 'Save'.

**Please Note.** This field is currently limited to 50 characters. If your website link is in excess of 50 characters, you can use [www.bitly.com](http://www.bitly.com) 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:

Date/Time	Event By	Event Of	Event Type	Description	Owner RefNo	Property RefNo	HolidayMa RefNo
28/01/2013 02:01 PM	ian	<a href="#">PLet2013/00...</a>	Letter	Ms Zoe Baker(PL2013/0001,,...			<a href="#">H2010/00</a>
28/01/2013 02:04 PM	ian			New holiday booking		<a href="#">P2010/0001</a>	<a href="#">H2012/00</a>
28/01/2013 02:06 PM	ian	<a href="#">REC00070</a>		Monies received in		<a href="#">P2010/0001</a>	<a href="#">H2012/00</a>
28/01/2013 02:06 PM	ian		Change of bo...	Change to Deposit Received		<a href="#">P2010/0001</a>	<a href="#">H2012/00</a>
28/01/2013 02:20 PM	ian			New holiday booking		<a href="#">P2010/0001</a>	<a href="#">H2012/00</a>
28/01/2013 02:20 PM	ian	<a href="#">REC00071</a>		Monies received in		<a href="#">P2010/0001</a>	<a href="#">H2012/00</a>
28/01/2013 02:20 PM	ian		Change of bo...	Change to Full Paid		<a href="#">P2010/0001</a>	<a href="#">H2012/00</a>
28/01/2013 02:21 PM	ian			New Unavailable period	<a href="#">O2010/0001</a>	<a href="#">P2010/0001</a>	
28/01/2013 02:21 PM	ian			New holiday booking		<a href="#">P2010/0001</a>	<a href="#">H2011/00</a>
28/01/2013 02:21 PM	ian		Change of bo...	Change to Cancelled		<a href="#">P2010/0001</a>	<a href="#">H2011/00</a>
28/01/2013 02:21 PM	ian		Cancelled boo...	Booking Cancellation		<a href="#">P2010/0001</a>	<a href="#">H2011/00</a>
28/01/2013 02:22 PM	ian			New holiday booking		<a href="#">P2010/0002</a>	<a href="#">H2012/00</a>
28/01/2013 02:22 PM	ian	<a href="#">REC00072</a>		Monies received in		<a href="#">P2010/0002</a>	<a href="#">H2012/00</a>
28/01/2013 02:22 PM	ian		Change of bo...	Change to Full Paid		<a href="#">P2010/0003</a>	<a href="#">H2012/00</a>
28/01/2013 02:23 PM	ian			New holiday booking		<a href="#">P2010/0003</a>	<a href="#">H2012/00</a>
28/01/2013 02:23 PM	ian	<a href="#">REC00073</a>		Monies received in		<a href="#">P2010/0003</a>	<a href="#">H2012/00</a>
28/01/2013 02:23 PM	ian		Change of bo...	Change to Full Paid		<a href="#">P2010/0003</a>	<a href="#">H2012/00</a>

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.

The screenshot shows the 'Holiday Manager : System Settings' window with the 'Invoice Type' tab selected. The interface is divided into several sections for configuring different document types:

- Accounts Documentation:**
  - Invoice:** Layout: HeaderFooter, Watermark: [blank], Header Logo: [checked] HLS Header, Footer Logo: [checked] Footer, Pages: Page 1, [Preview]
  - Receipt:** Layout: HeaderFooter, Watermark: [blank], Header Logo: [checked] HLS Header, Footer Logo: [checked] Footer, Pages: Page 1, [Preview]
  - Statement:** Layout: HeaderFooter, Watermark: [blank], Header Logo: [checked] HLS Header, Footer Logo: [checked] Footer, Pages: Page 1, [Preview]
- Booking:** (highlighted with a red box) Layout: HeaderFooter, Watermark: [blank], Header Logo: [checked] HLS Header, Footer Logo: [checked] Footer, Pages: [blank], [Preview]

At the bottom, there is an 'Invoice Type' section with a table:

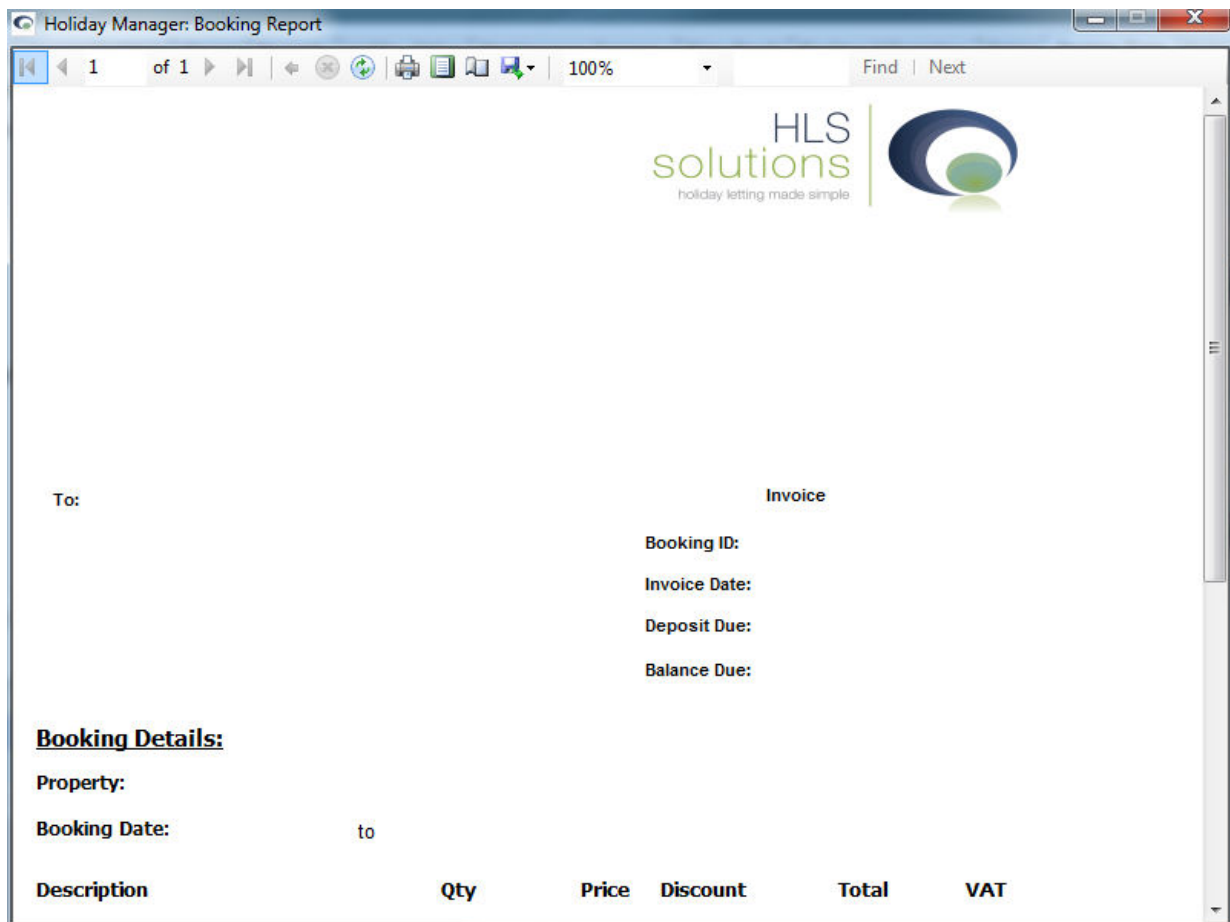
Description
Owner
Guest
Maintenance

Buttons for 'Add Type', 'Close', and 'Save' are located at the bottom right of the window.

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.

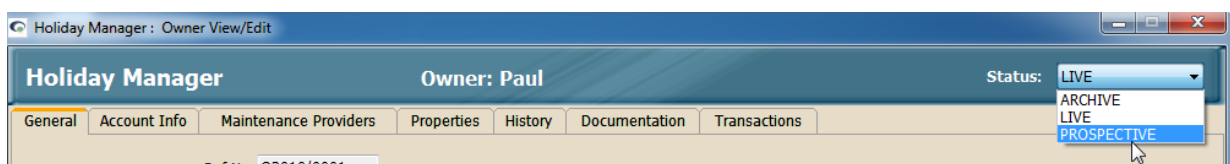
To see how your header will look, each document has a Preview button, which will display a blank copy of the form with the options selected shown.





## 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.



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.

Holiday Manager : Search Owner

### Holiday Manager

Search Result

Ref #	First Name	Surname	Status	Town
<a href="#">O2010/0001</a>	Paul	Reed	Prospective	Bristol
<a href="#">O2010/0002</a>	Amy	Bewick	Active	Bath
<a href="#">O2010/0003</a>	Rebecca	Walsh	Active	Exeter
<a href="#">O2010/0004</a>	Peter	Baker	Active	Barnstaple
<a href="#">O2010/0005</a>	Matthew	Evans	Active	Cardiff
<a href="#">O2010/0006</a>	Amy	Shaw	Active	Newton Abbot
<a href="#">O2010/0007</a>	Emily	Hunter	Active	Nottingham
<a href="#">O2010/0008</a>	Edward	Wilkins	Active	Truro
<a href="#">O2010/0009</a>	Martin	Cole	Active	Eastbourne
<a href="#">O2010/0010</a>	Richard	Walsh	Active	Cheltenham
<a href="#">O2010/0011</a>	Julia	Rees	Active	Hastings
<a href="#">O2010/0012</a>	Hannah	Jackson	Active	Oxford
<a href="#">O2011/0001</a>	Sandra	Henderson	Active	Cheltenham
<a href="#">O2012/0001</a>	David	West	Active	Bradford

Search Option

Ref No

Firstname

Surname

Town

Post Code

Show All Status

14 records found

[Add New](#) [Refresh](#)

Holiday Manager : Owner Report

### Holiday Manager

Specify Additional Criteria:  Status:  [Refresh](#)

Select	Ref No	Status	Date Added	Title	First Name	Surname	House Name	Address 1	Address 2
<input checked="" type="checkbox"/>	O2010/0001	Prospective	01/12/2010	Mr	Paul	Reed	34	OSBORNE AV...	KNOWLE...
<input checked="" type="checkbox"/>	O2010/0002	Active	01/12/2010	Mrs	Amy	Bewick	79	GORDON ROAD	
<input checked="" type="checkbox"/>	O2010/0003	Active	01/12/2010	Dr	Rebecca	Walsh	2	THE SWALLO...	
<input checked="" type="checkbox"/>	O2010/0004	Active	01/12/2010	Mr	Peter	Baker	9	ABBAY CLOSE	
<input checked="" type="checkbox"/>	O2010/0005	Active	01/12/2010	Mr	Matthew	Evans	45	ST. BRENDAN...	
<input checked="" type="checkbox"/>	O2010/0006	Active	01/12/2010	Ms	Amy	Shaw	109	TENBY ROAD	
<input checked="" type="checkbox"/>	O2010/0007	Active	01/12/2010	Miss	Emily	Hunter		34	ROWAN
<input checked="" type="checkbox"/>	O2010/0008	Active	01/12/2010	Mr	Edward	Wilkins	7	KENSINGTON ...	
<input checked="" type="checkbox"/>	O2010/0009	Active	01/12/2010	Dr	Martin	Cole	871	SOUTH ROAD	
<input checked="" type="checkbox"/>	O2010/0010	Active	01/12/2010	Mr	Richard	Walsh	23	HILLVIEW	
<input checked="" type="checkbox"/>	O2010/0011	Active	01/12/2010	Mrs	Julia	Rees	Flat 4B	BUSH AVENUE	
<input checked="" type="checkbox"/>	O2010/0012	Active	01/12/2010	Ms	Hannah	Jackson	The Beeches	WILMOTT CO...	

[Select all](#) [Deselect all](#)

Generate letter   [Queue](#)

Generate SMS

Add Task   Assign to

Priority  Add reminder   Add

[Format Report](#) [Close](#) [Export](#) [Print](#) [Send](#)

## 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.

Alternatively we can also tick to Include/Exclude individual transactions as required.

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	7.50	<input checked="" type="checkbox"/>						
23/02/2013	B2013/0002	The Lodge	Managemen...	156.75	31.35	<input checked="" type="checkbox"/>						
23/02/2013	B2013/0002	The Lodge	Booking Cha...	20.00	0.00	<input checked="" type="checkbox"/>						
24/02/2013	B2013/0004	Towan Ap...	Managemen...	225.00	45.00	<input checked="" type="checkbox"/>						
24/02/2013	B2013/0004	Towan Ap...	Booking Cha...	20.00	4.00	<input checked="" type="checkbox"/>						
13/02/2013	B2013/0005	Rock Cotta...	Managemen...	187.50	37.50	<input checked="" type="checkbox"/>						
13/02/2013	B2013/0005	Rock Cotta...	Booking Cha...	20.00	4.00	<input checked="" type="checkbox"/>						
21/02/2013	B2013/0006	Eden Reach	Managemen...	97.50	19.50	<input checked="" type="checkbox"/>						

## 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.