



HLS Holiday Manager Software Manual

Word Processing & Merge Codes

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Introduction

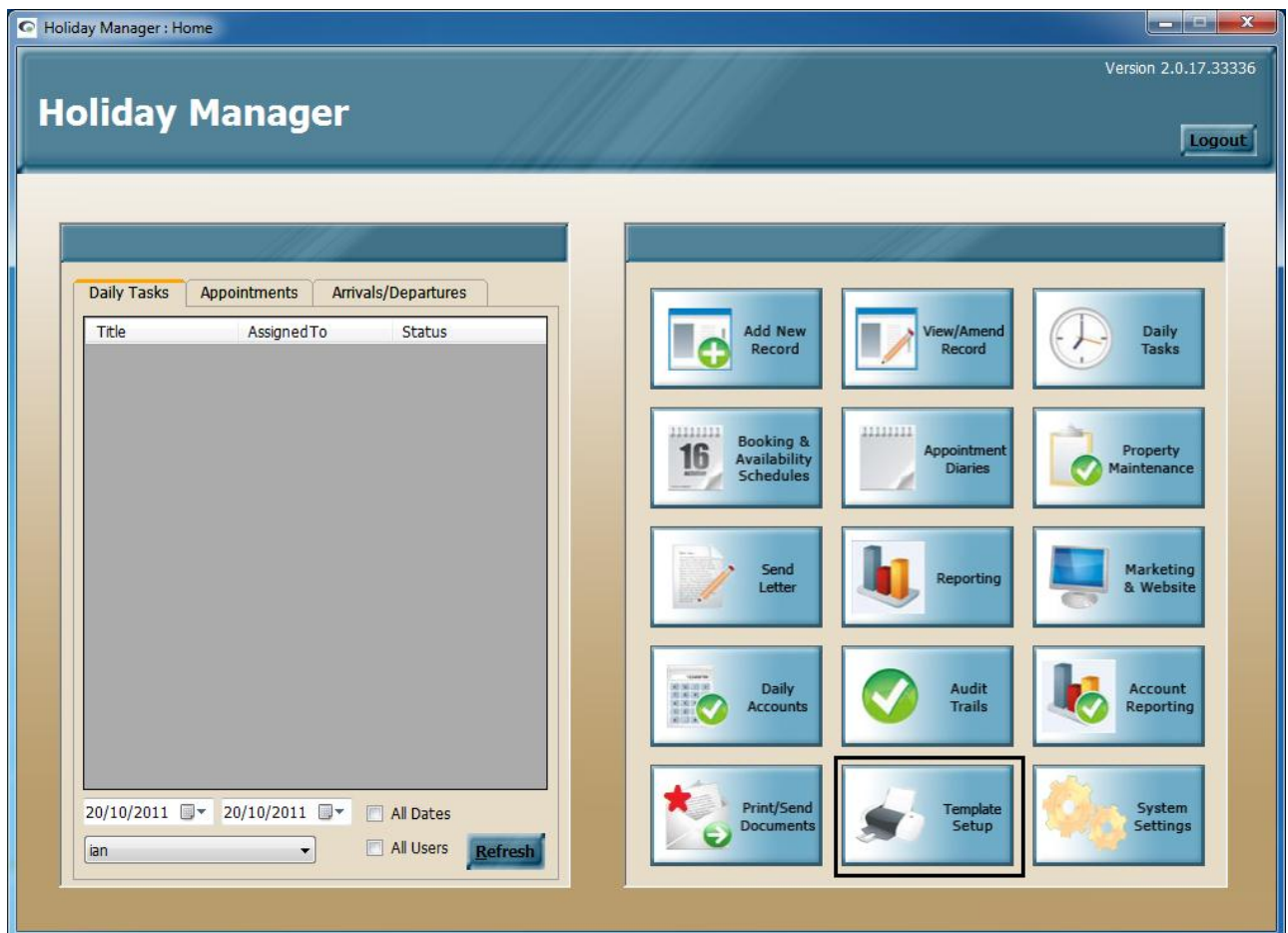
The Word Processing feature within the program has been designed to provide agents with a quick and easy way to merge letters and emails to send out to their clients.

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.

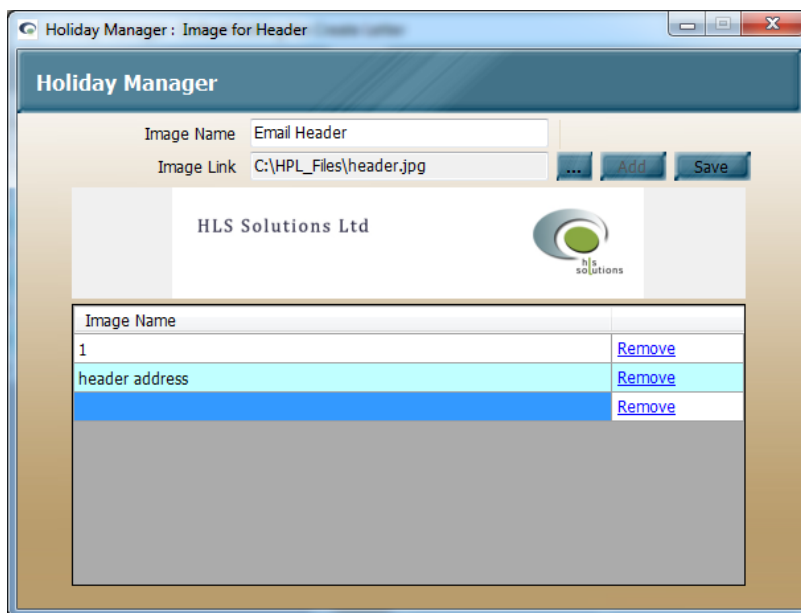
“New” and “Amendment”, are used to create and amend any standard templates respectively. The “Default Setting” will allow you to add Headers and Footers for use on letters and select the font size and style you wish to use. The “Automated Letter” option will allow you to set follow up reminders for any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

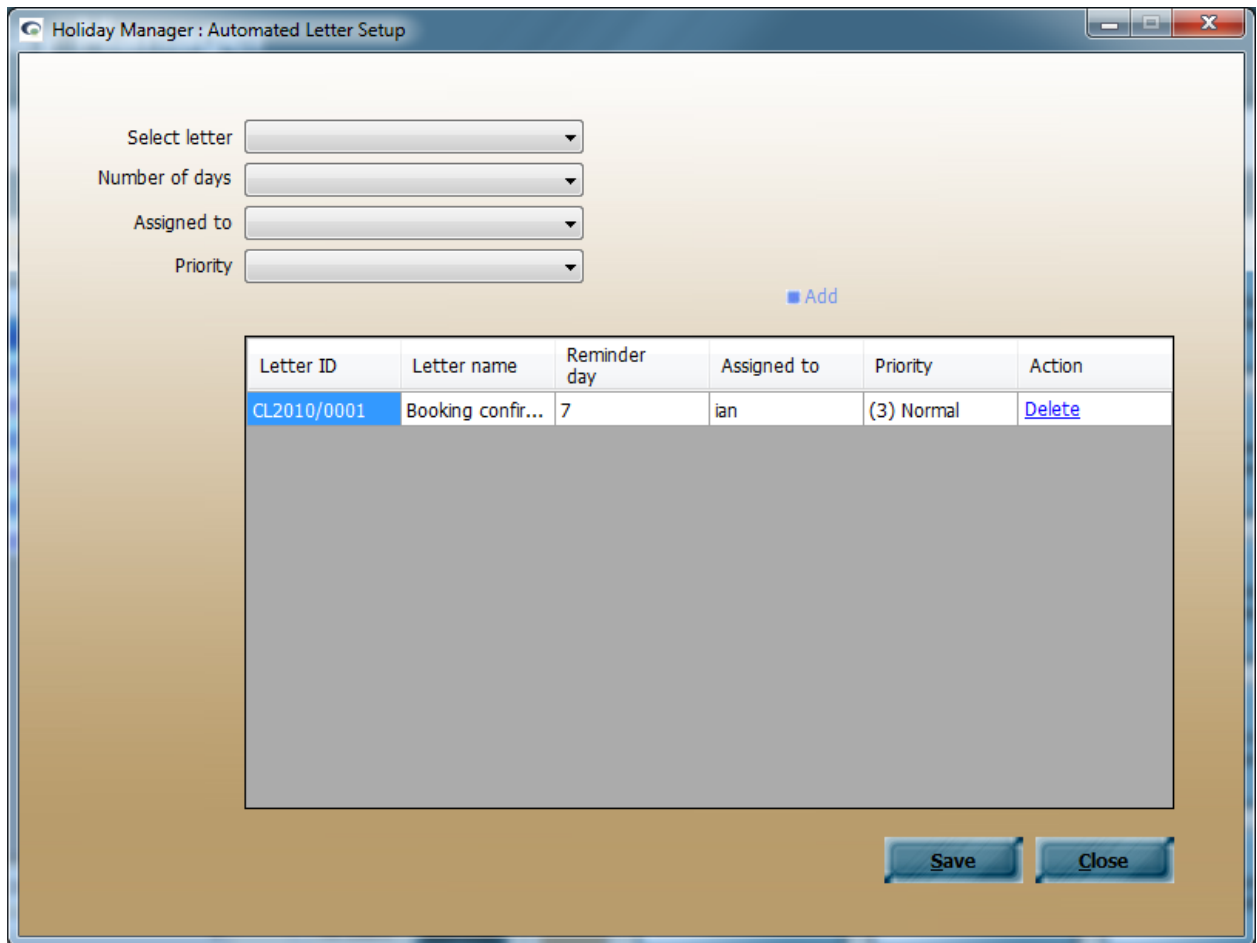
Once you have selected your choice of fonts simply click **“OK”** to save.

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.

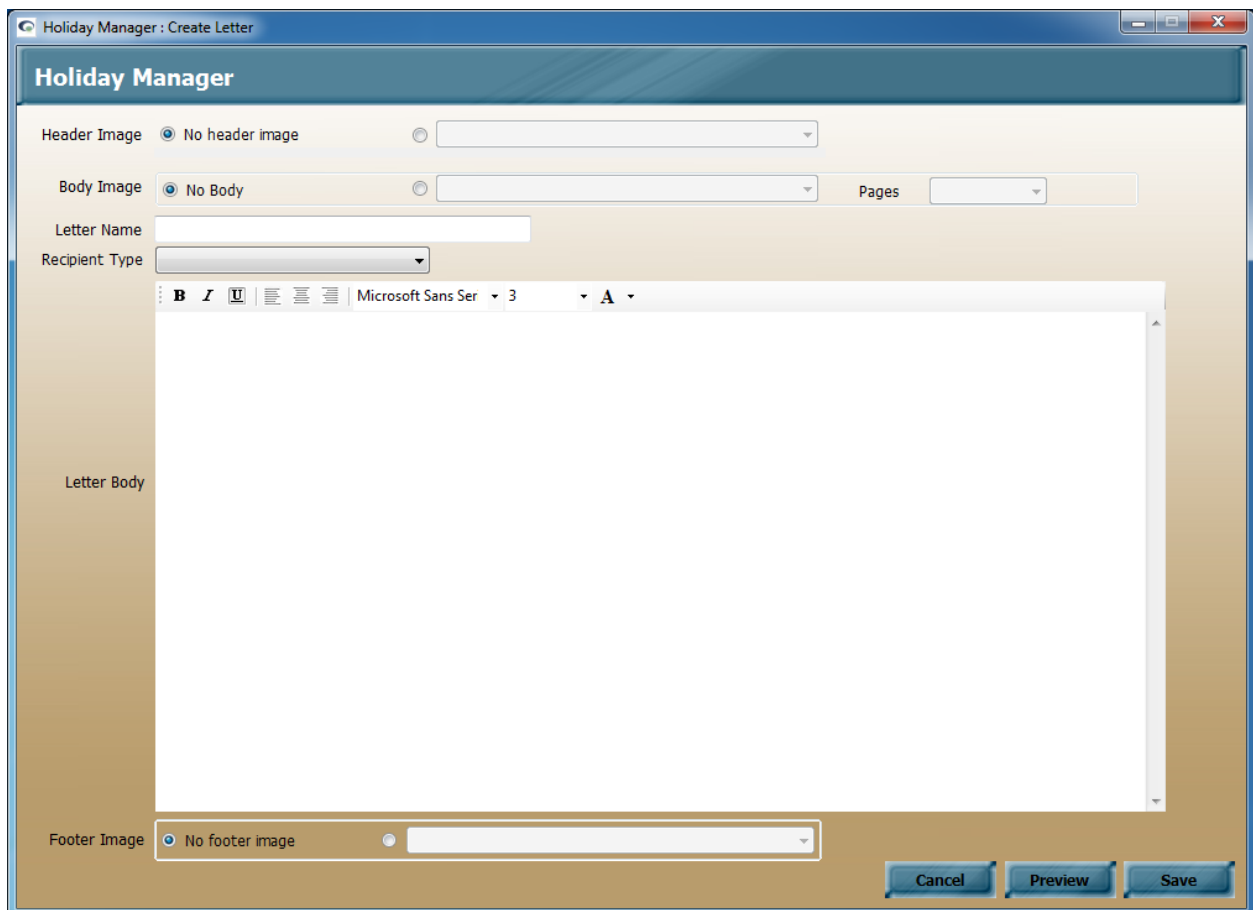


Creating and Amending Templates

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.

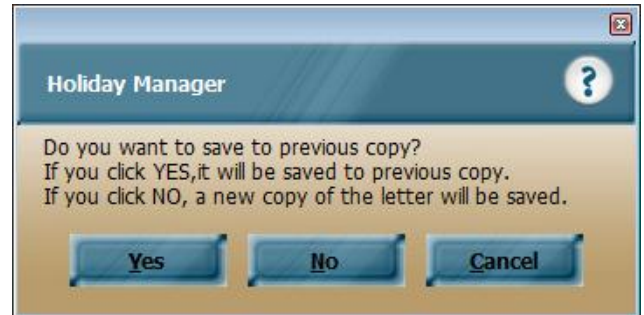
From the main screen click on the “**Template Setup**” button, then select “**Amendment**” from the subsequent menu options.

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.



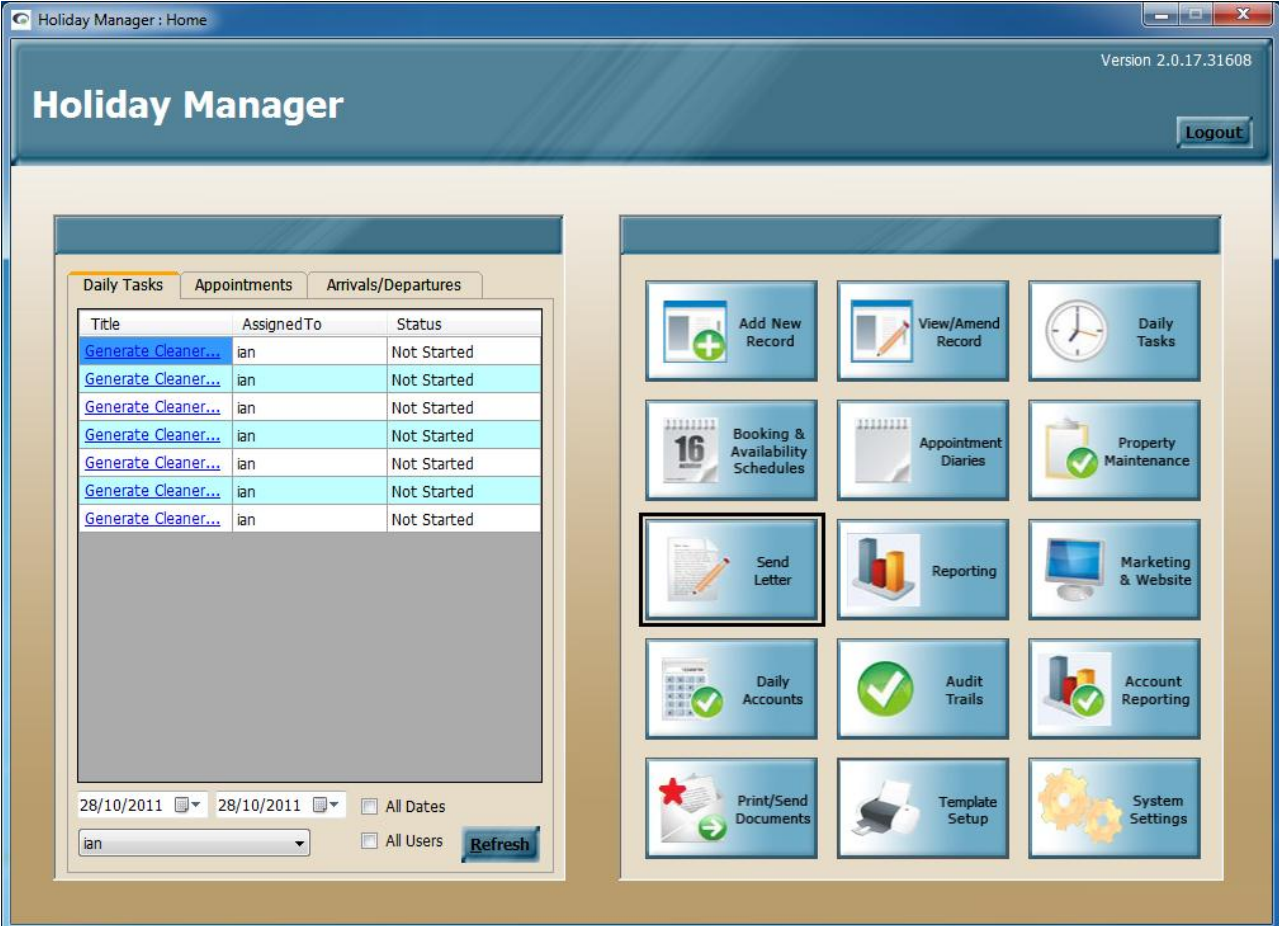
Please note: If you have made changes to a letter and click on close, you will be prompted that the letter has changed and given the option to save these changes. This will overwrite the existing template, and you will not be given the option to save a new copy of the letter. If this is not what you 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.

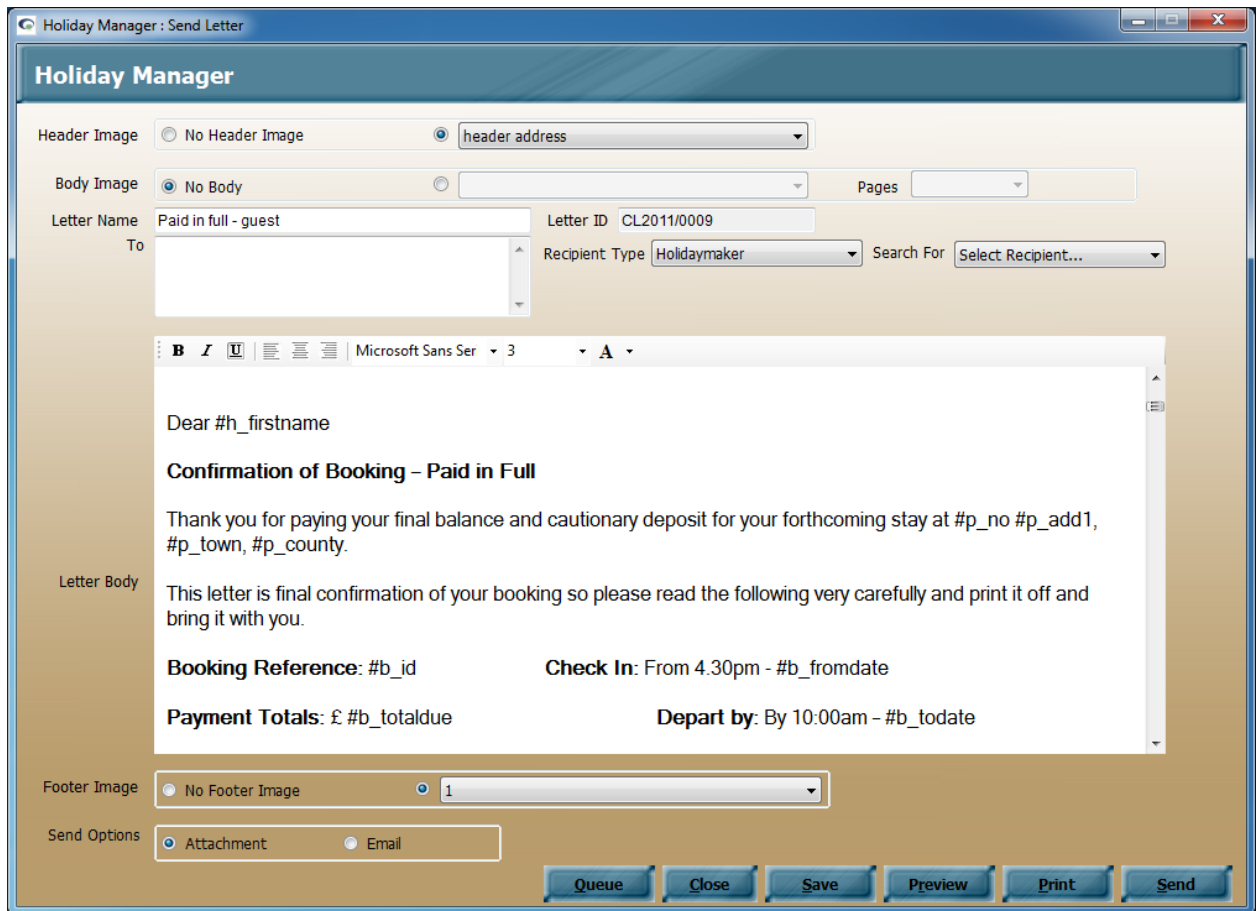


The screenshot displays the 'Holiday Manager' software interface. The window title is 'Holiday Manager : Home' and the version is 'Version 2.0.17.31608'. A 'Logout' button is visible in the top right corner. The main interface is divided into two main sections. On the left, there is a table with columns 'Title', 'AssignedTo', and 'Status'. The table contains seven rows, each with a blue underlined link 'Generate Cleaner...', the name 'ian', and the status 'Not Started'. Below the table are date filters for '28/10/2011', a user dropdown menu set to 'ian', checkboxes for 'All Dates' and 'All Users', and a 'Refresh' button. On the right, there is a grid of 15 menu items, each with an icon and a label: 'Add New Record', 'View/Amend Record', 'Daily Tasks', 'Booking & Availability Schedules', 'Appointment Diaries', 'Property Maintenance', 'Send Letter' (highlighted with a red border), 'Reporting', 'Marketing & Website', 'Daily Accounts', 'Audit Trails', 'Account Reporting', 'Print/Send Documents', 'Template Setup', and 'System Settings'.

| Title | AssignedTo | Status |
|-------------------------------------|------------|-------------|
| Generate Cleaner... | ian | Not Started |
| Generate Cleaner... | ian | Not Started |
| Generate Cleaner... | ian | Not Started |
| Generate Cleaner... | ian | Not Started |
| Generate Cleaner... | ian | Not Started |
| Generate Cleaner... | ian | Not Started |
| Generate Cleaner... | ian | Not Started |

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 top 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.

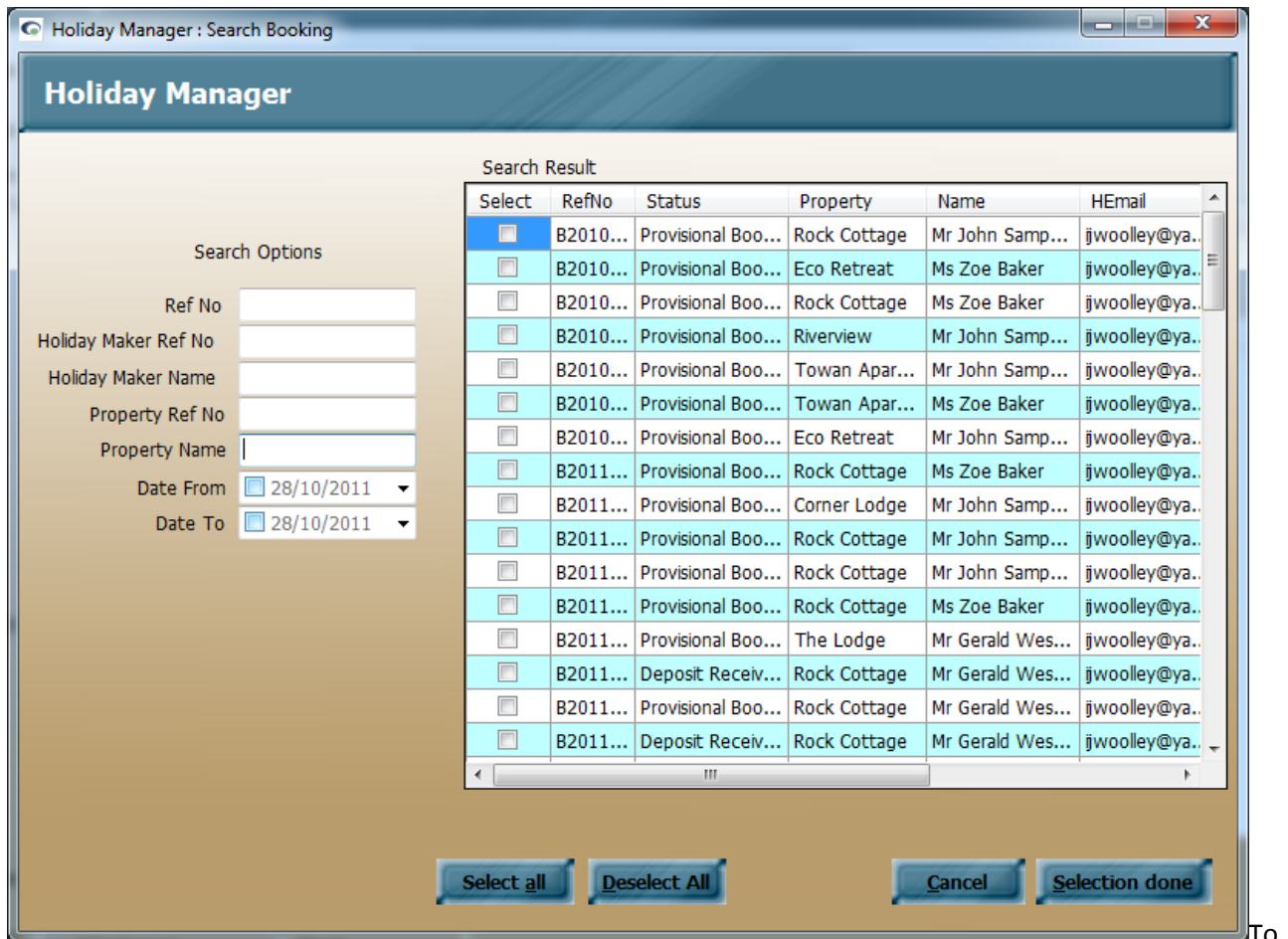
All these fields will have already been populated by default, and no input will normally be required. We do however need to choose who we want to send the document to, which is where the Select Recipient dropdown is used.

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.

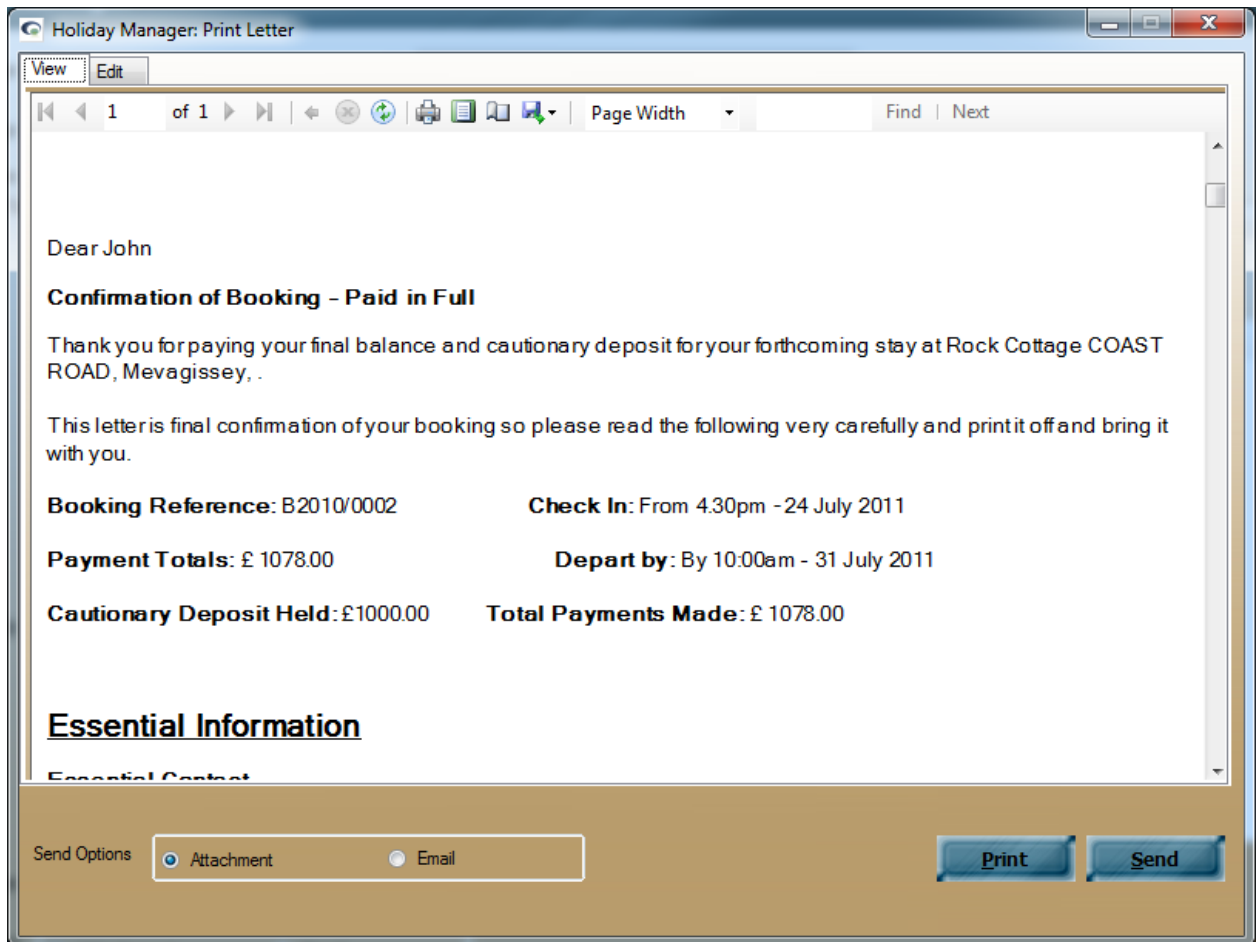
To choose multiple recipients simply tick on the select box for all required, or click the **“Select all”** button at the bottom of the screen.

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.

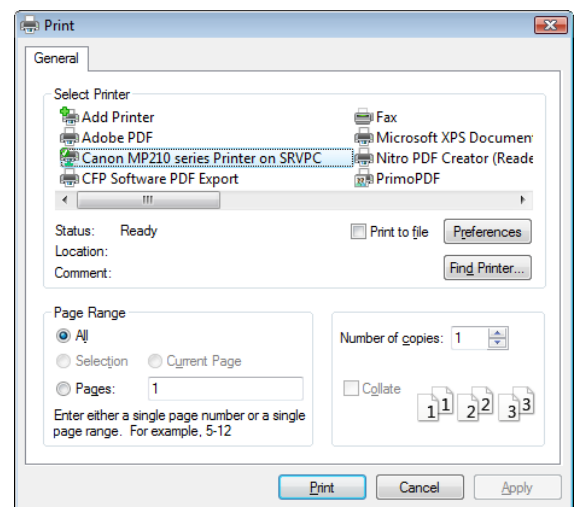
If you wish to add your merged letter to a queue to print/send later, clicking on the “Queue” option will add your merged letter(s) to the Print/Send document section where they can be viewed and printed as required.

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_ongame | 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 |
| 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 |
| 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 |

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 | Any booking notes |
| 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 |
| 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 |

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 |