HLS Solutions Ltd
Software Manual

Booking & Availability

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Contents

Booking & Availability

Introduction

There are two main ways you can create a new holiday booking. If you know which property or holidaymaker you wish to use for the booking you can enter via the information screen, alternatively on the main menu there is a booking and availability schedule that will show you the availability of all of your properties, as shown below.

Booking & Availability Schedules

Clicking on the Booking & Availability Schedules button will bring up the list of all of your properties. On the left hand side of the screen you have the search options to allow you to narrow down the properties that you see in the main list.

If you wish to change the order the properties are viewed, simply click on the relevant column heading and this will sort the properties accordingly.

The availability or further information regarding a single property can be obtained by clicking on the property in question in any field across the grid. At this point the lower section of the screen will display the availability for this property.

The availability will bring up the following 4 months availability for this property, with the booked holidays indicated in the relevant colour to show the status of the booking.

Putting the mouse over a blank week will display the weekly booking price for the relevant week, moving the mouse over a booked week will display the booked holiday information.

To make a new booking, simply click on the start date for the holiday and choose whether you wish to make a booking, or mark the property unavailable (for an owner booking, or for maintenance work etc.).

In the bottom corner you have the option to switch from the availability view to show the property details, which include a picture and a summary of the property marketing information. There is also a link to allow you to jump to the full property information to access any additional information you require.

In addition to the availability for a single property, you also have the option to view a selection of properties to compare the availability, prices etc. for a booking.

To do this click on the Select tick box in the left hand column for the properties you are interested in and click on the **"Compare"** button.

You can view up to 4 properties at any one time and these will be displayed with the availability and marketing details for each property.

As on the main screen, putting the mouse over the relevant week or booking will show the price if the period is free or the booking details if a booking has already been made in this period.

At all times the calendar will automatically default to the changeover day for the property. The left hand column will always be the default start date for the holiday for this property. As you can see from the example below the top property calendar shows a Sunday changeover, with the other two showing a Saturday.

Once you are ready to make a booking, click on the start date of the holiday to make a new booking.

Making a Booking

When you have selected your start date for your booking, you will have the option to Make a Booking or to Mark Unavailable. The Make a booking option is selected by default and clicking Next will take you into the booking form.

The Mark Unavailable option is used to create an owner booking, or to link to a maintenance company a period that the property is undergoing work, or available to another party. This will be covered later in this document.

The booking form follows a very logical process, broken down into two distinct sections, the Booking Info and the Booking Summary. These are indicated by the two tabs at the top of the screen.

Booking Info

The Booking Info is split into the following sections:

Booking

The booking information is already populated with the start date of the holiday, based on the date you clicked on the previous screen. The Booking To date should be selected from the dropdown calendar first and will automatically calculate the number of nights and the base holiday cost for this booking.

Holidaymaker

The Holidaymaker screen allows you to enter the main Guest information for this holiday booking. To select the Guest information click on the locate button (**...**), and select the relevant holidaymaker record from the search screen. If the guest has not already stayed with you before, click on the Add New at the bottom of the search screen to create a new record.

The holidaymaker information fields will be populated automatically when the record is selected. The Source is automatically populated from the source on the holidaymaker screen; however this can be

changed here if the booking source differs. If the Source required is not already included on the dropdown menu, simply select the Add New Source option to create.

Party

The Party information can be used to retain detailed or summary information about the guests staying for this booking. If you do not wish to retain in depth booking information, you can simply indicate the total number of Adults, Children and Infants, which will automatically calculate and populate the Total in Party box.

If you wish to add more detailed information, select the Guest Information option, which will open a new screen for you to add the full details of each Guest.

Any additional guest information that is already contained on the holidaymaker record, will automatically be displayed for you to select the relevant guests for this particular stay.

Notes

This field is used to display Booking Notes for this booking. These will appear on a lot of the Booking and Cleaner reports, and can therefore be used to indicate pertinent information about the booking.

Property

Populated automatically by the system, and will indicate the name, reference number and property notes.

Extra

This section will display all of the available extras that are applicable for this property. Any that have been selected as Default Extras will already be ticked to include. If more than one item is available you will see this indicated by the Num Avail column. If you tick to include this extra the number selected will default to 1, but can be amended up to the maximum shown here.

At the bottom of the Extra section a Total Extra box contains a running total of the options selected.

When you are happy with the information entered, click on the Next button at the bottom of the screen, or click on the Booking Summary tab at the top.

Booking Summary

At this point you have the option to amend the holiday rental cost, by clicking on the Override tick box. You can also apply a pre-selected discount code from the dropdown menu, or a manual discount by using the override tick box.

Full information on any extras that have been applied to the booking will appear next, along with a tick box to select if these are due with the deposit or at the time of the full payment. This will only appear if the booking is made in advance of the holiday start date, at which point the system will split the monies owed into a deposit due and a full balance.

You have the option at this stage as well to add a card surcharge by clicking on the drop down list and selecting the type of card they will be paying with.

The right hand side of the screen will show you the financial details of the booking with the amount due as a deposit and full balance and a breakdown of where the money will be going for this booking in the Booking Summary section. You also have the option to manually adjust the deposit due, by clicking on the override

tick box. If you changing the amount due here, the system will automatically make the relevant changes to the amount owed on the Total Balance Due section.

Once you are happy that everything has been entered correctly, click on the Book button to make the booking.

The system will bring up a copy of the booking invoice for your information and the booking is complete.

The status of this booking is now "Provisional" and will remain as this until the money has been received for the deposit/full balance.

Additional Options

Once the booking has been made, you have a number of options available to you from these screens.

Add Notes

The Add notes facility gives you the option to add relevant notes to the history of a booking. This is a very useful facility for tracking booking feedback, or recording information about the booking.

To add a new booking note, click the "Add Notes" button at the bottom of the booking screen.

Click on the Reference drop down menu to select whether this is Booking Feedback, a Booking Note or a Complaint. These options will allow you to narrow down your reports for feedback, complaints etc.
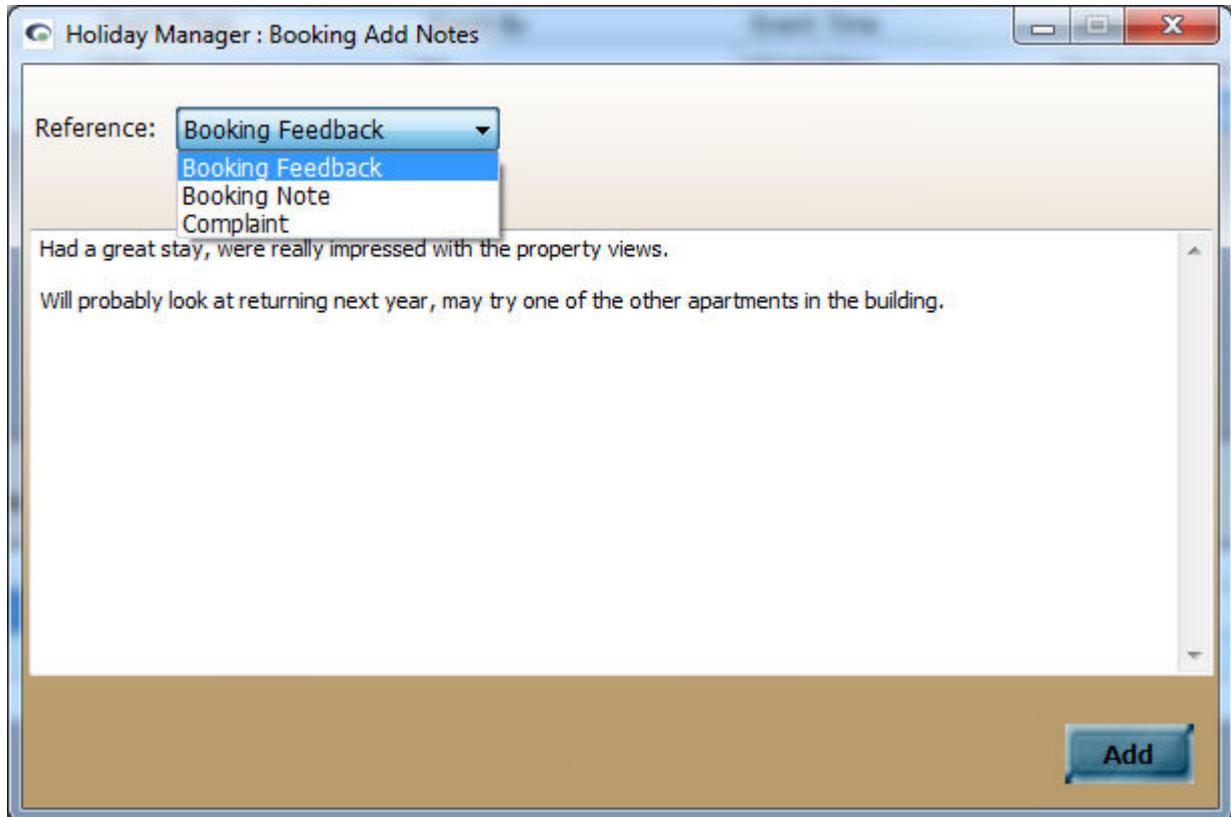
Enter the information in the main section, and when you are finished, click the Add button to add to the booking history.

The Booking History is the last tab along the top of the booking screen, and will show you the history of this booking including any tasks, notes and transaction details.
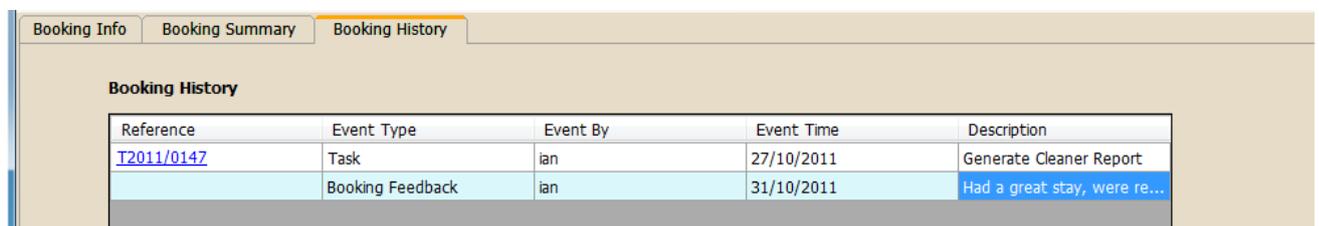
Send Mail

The Send Mail option allows you to send a copy of the completed booking form to the holidaymaker along with a covering email.

The following screen will come up with the To field populated with the holidaymaker as a recipient.

You have the option to include further recipients, CC, or include a copy to yourself by clicking in the Receive Copy tick box.
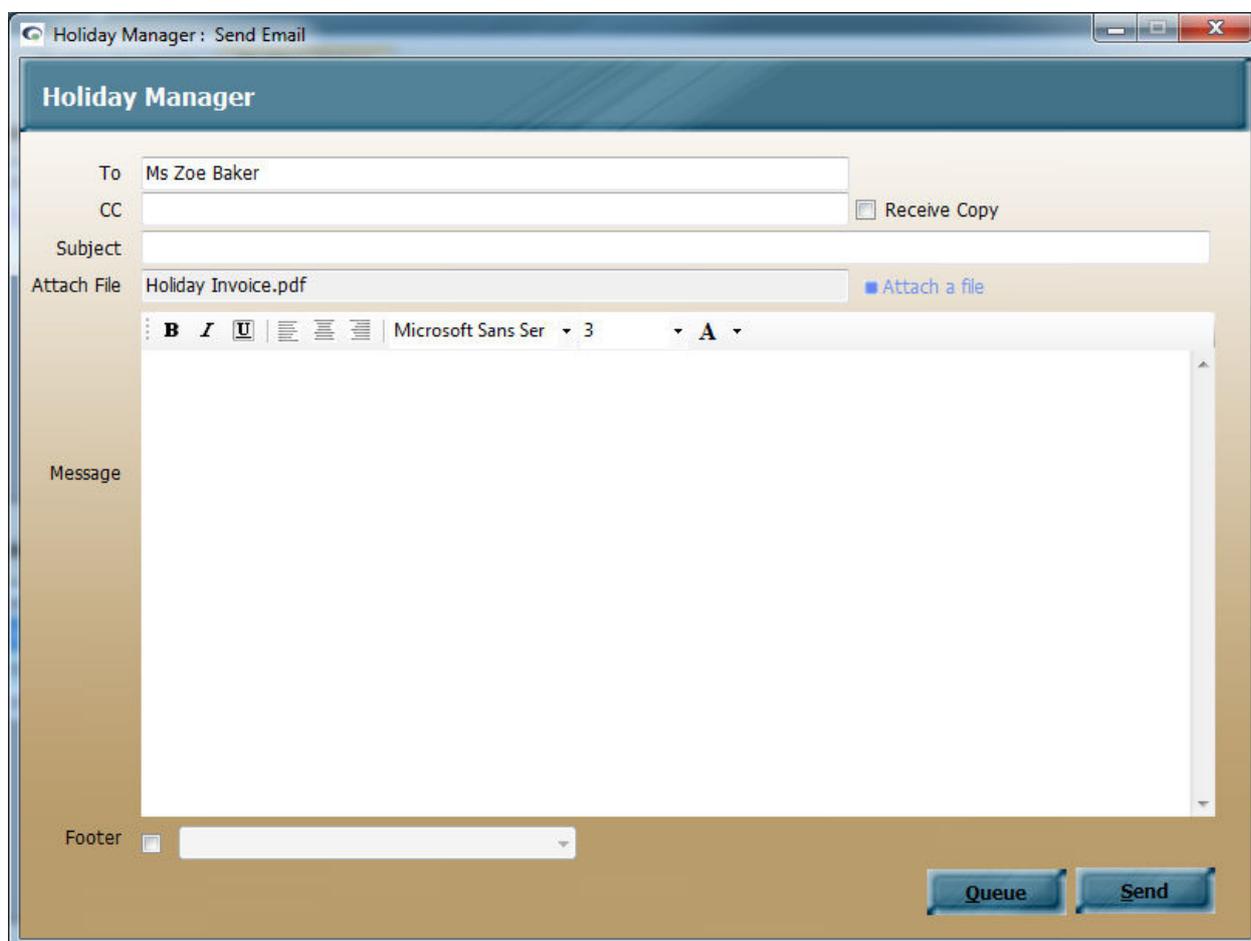
As befitting a standard email, you will need to add a relevant subject and message. An Email footer can be added to your email if required, by clicking in the Footer tick box and selecting the required image from the dropdown menu.

To send immediately click on the Send button, or optionally the email can be added to the Print/Send document section by clicking on the Queue button.

By adding to the Print/Send documents queue you can merge the booking form and covering email with any letters and other documentation that you have generated for this guest.

Receive Monies

There are a number of ways you can receive monies for an outstanding invoice or holiday booking, and one of the easiest is from the booking screen.

Click on the Receive Monies button to open the receipt screen(s) for this booking. If your booking has been made in advance there will be two separate receipt screens come up, the first showing just the deposit that is due. If your full balance is due in one payment, only one receipt screen with the full amount will appear.

If you have selected a card surcharge, the payment type will have already been populated, alternatively select from the drop down list how the payment is being received. You can also enter any reference and any notes that you wish to add for this receipt if required.

The bottom half of the screen provides details of the monies that are outstanding. If you are receiving the full amount, simply click on the All tick box next to each transaction, if you are receiving a partial payment, enter the amount in the Apportion column. The Total Received and Invoice Outstanding fields will update automatically.

To preview the receipt screen for the guest, click on the Preview button at the bottom of the screen. When you are ready to update the transaction, click on Update to receive in the payment.

Once the receipt has been updated, you will have some further buttons available at the bottom of the screen.

Print	Send Mail	Update	Close

The Print will allow you to view the completed receipt and print or export into another format. The Send Mail option will allow you to send the completed Receipt to the guest via email.

Similar to the booking form, you can add the relevant information to your email before sending, and either send immediately or add to the Print/Send documents section.
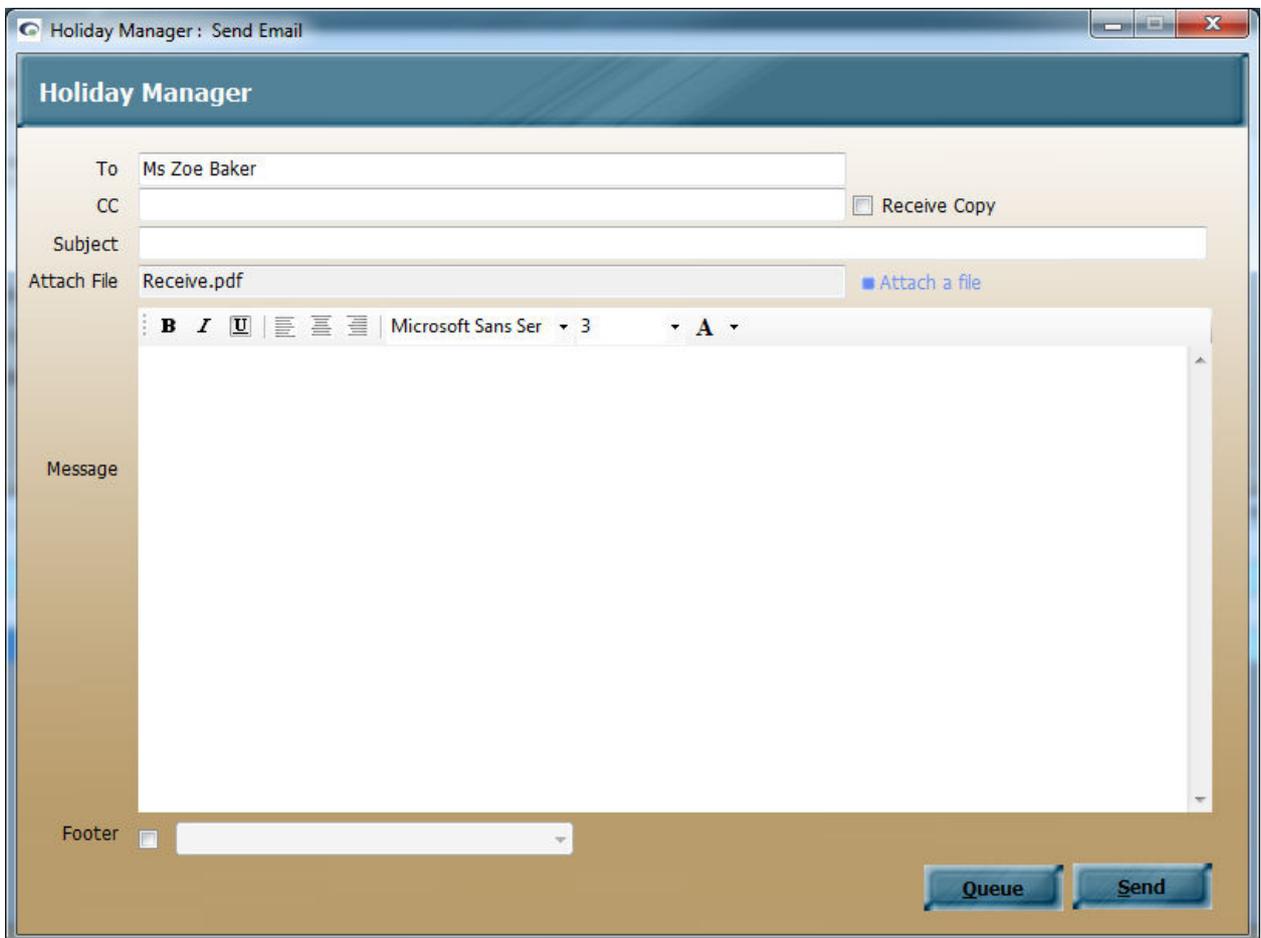
When you click on close you will return to the booking screen. If the Booking status has changed, from Provisional to Deposit Paid, or Full Paid, for example, and you have configured Automated System Events, you will receive a prompt asking if you wish to generate a system Event.
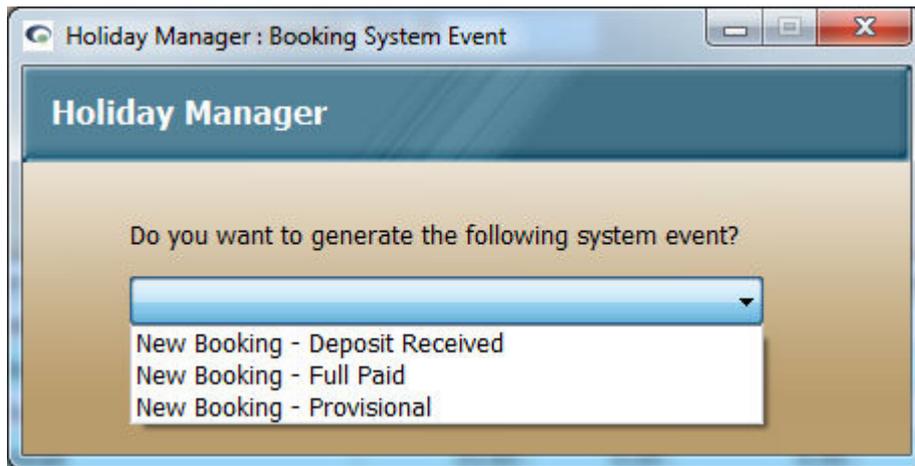
This functionality allows you to configure a series of automated letters, SMS text messages or reminders to be produced automatically. See the System Settings manual for further details on this functionality.

Property Screen Booking

If you are in a property screen, you have an option to make a booking direct from here, without having to access the Booking and Availability screen. This function can also be used to quickly view the availability of a property.
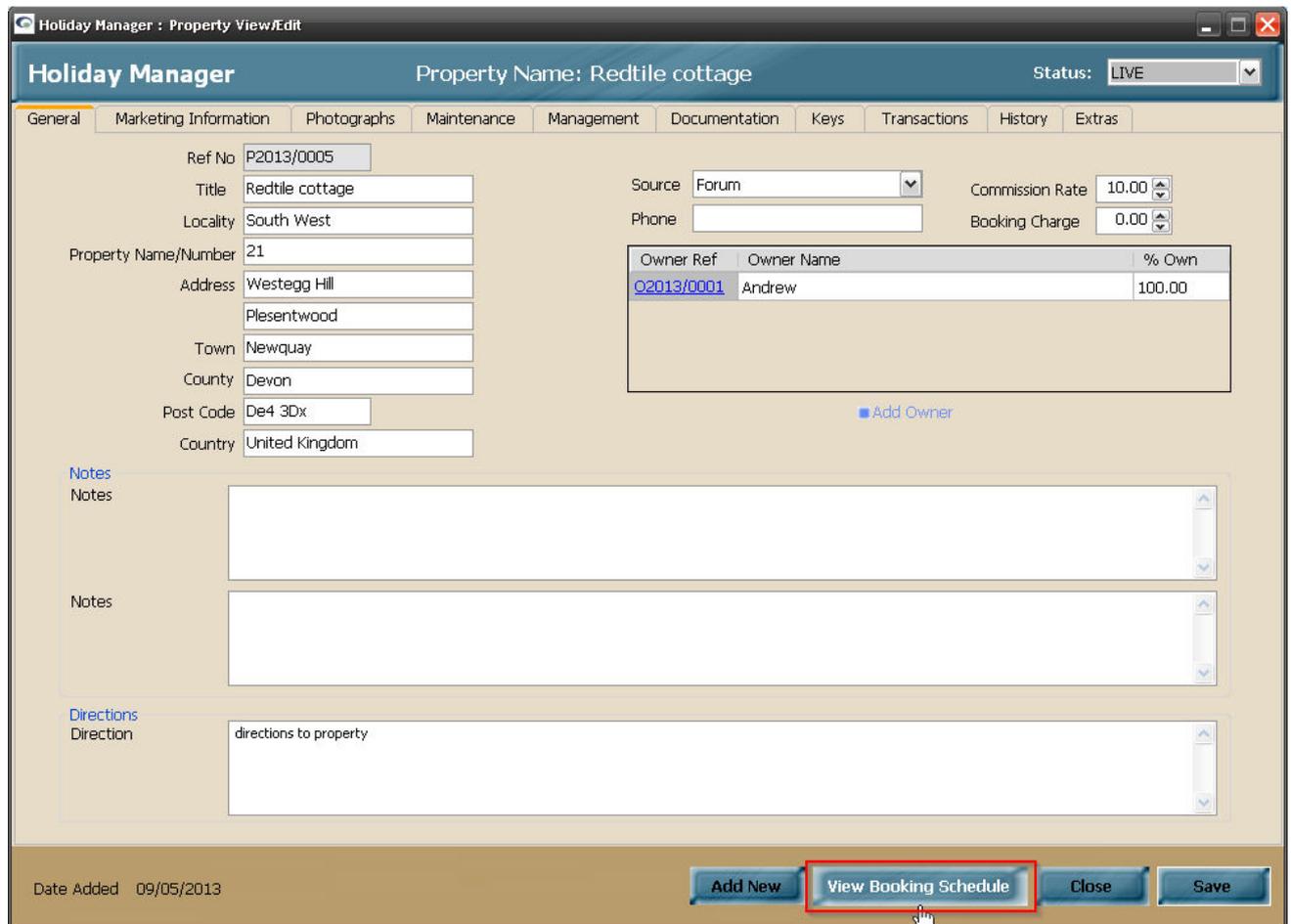
Click on the search and select the property record you want to make a new booking for. At the bottom of the property screen there is an option to View Booking Schedule.
Clicking this will bring up the availability for this particular property.

From here the process is exactly the same as above to select the relevant dates and complete a booking.

The Availability screen will appear with the booking information for this property only.

A new booking can be made in the normal way by clicking on the start date for the holiday and the steps for the booking will be exactly the same as the previous section.

Holidaymaker Screen Booking

From a holidaymaker screen you have a book holiday button at the bottom of the screen.

Clicking on the Book Holiday button will take you into the Booking and Availability section, with one main exception. When you choose the property you wish to book, and select the start date of the holiday, the booking form will already be populated with the holidaymaker information.

The rest of the steps are exactly the same as detailed above.