



HLS Solutions Ltd Update Notes

Version 2.0.18

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Specialists in software,
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for the holiday letting industry
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Summary

Below you will find brief information on the changes that have been introduced for the latest release of the software, version **2.0.18**.

This version has been released as part of a scheduled release based on feedback from current system users. We have also looked to continue the work from the recent releases by adding additional functionality and features to the system events, automated letters and email aspects of the program.

The main features included in this version are:

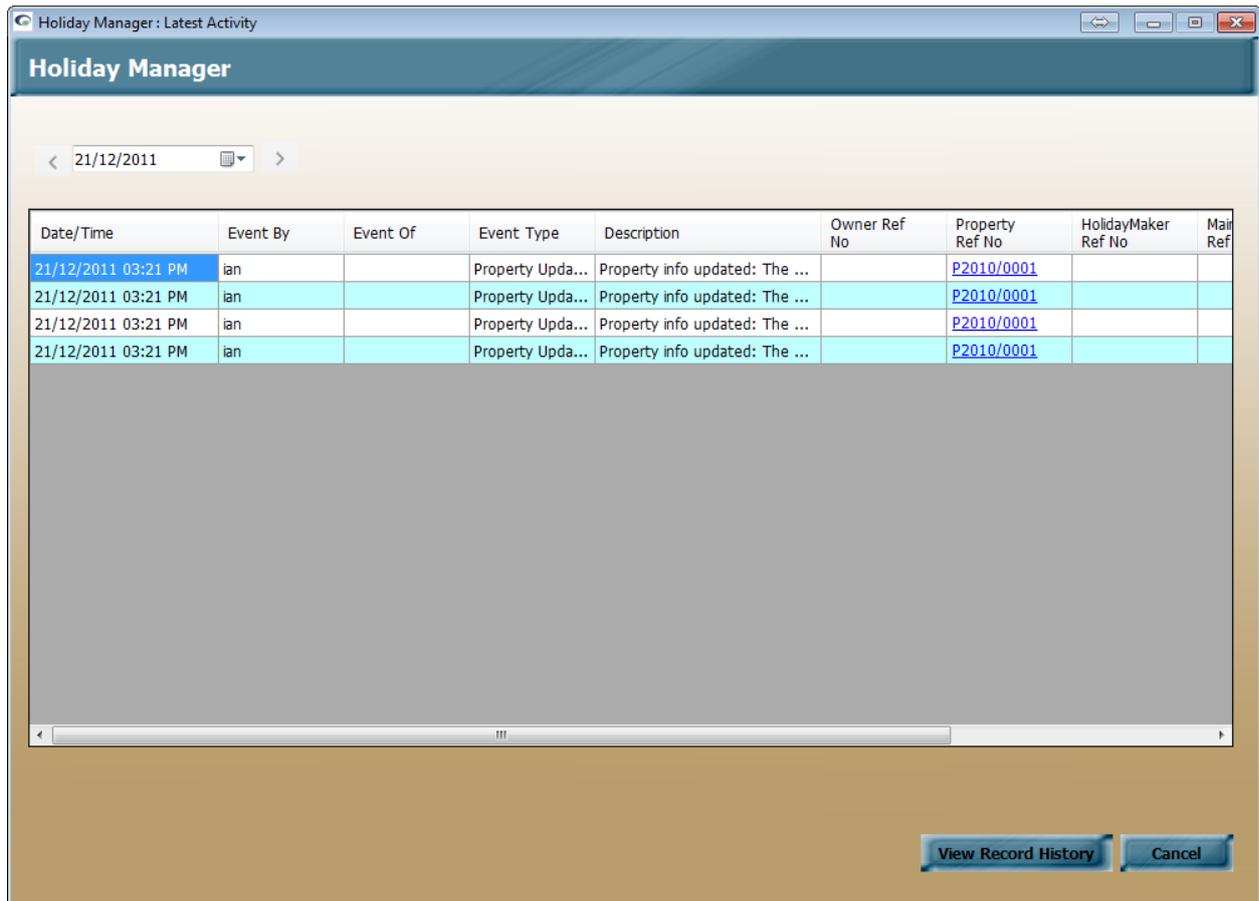
- New “Latest Activity” Section
- New Cleaner report
- New Report formatting
- Additional merge codes
- Additional linked maintenance provider on Property section
- Caretaker option for Print/Send Documents
- Extra fields on information screens

Latest Activity

The screenshot displays the 'Holiday Manager' software interface. The window title is 'Holiday Manager : Home' and the version is 'Version 2.0.17.26787'. The main header is 'Holiday Manager' with a 'Logout' button. The interface is divided into two main sections. On the left, there is a table with columns 'Title', 'Assigned To', and 'Status'. Below the table are date filters for '21/12/2011' and '21/12/2011', checkboxes for 'All Dates' and 'All Users', a dropdown menu with 'ian', and a 'Refresh' button. On the right, there is a grid of 12 functional buttons: 'Add New Record', 'View/Amend Record', 'Daily Tasks', 'Booking & Availability Schedules', 'Appointment Diaries', 'Property Maintenance', 'Send Letter', 'Reporting', 'Marketing & Website', 'Daily Accounts', 'Latest Activity', 'Account Reporting', 'Print/Send Documents', 'Template Setup', and 'System Settings'.

On the main screen, we now have a brand new section of the program. The “Latest Activity” will now provide you with a real time history of everything that is taking place on the system, along with the option to view the full individual history of all your records.

Clicking into the “Latest Activity” section will provide you with a list of all of the activity that has taken place on the system today. From here you can use the arrows in the top left hand corner of the screen to scroll through a day at a time to view alternative days, or you can click on the drop down arrow to pull up a calendar to select a specific date to view.

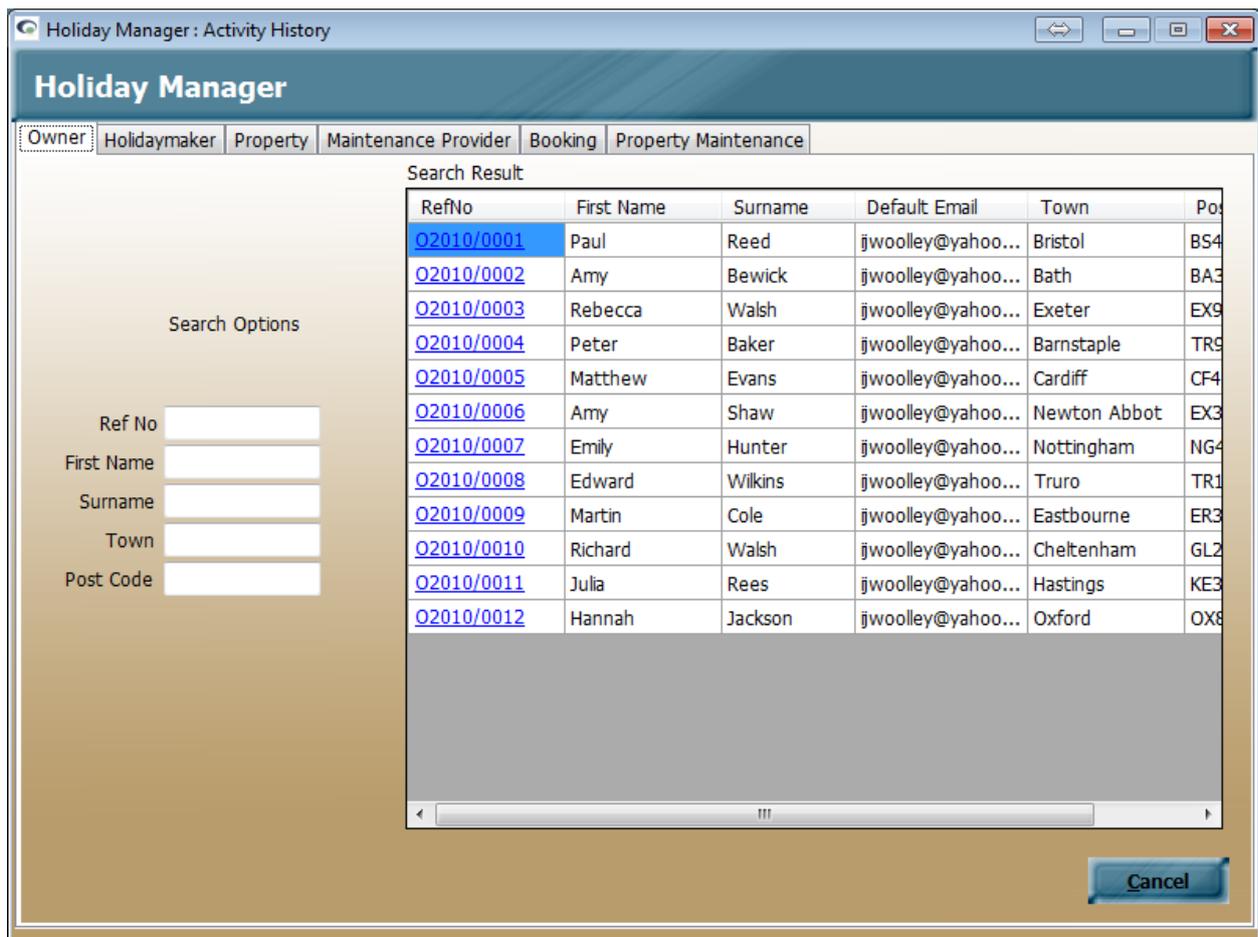


At any point you have a blue underlined link you can click on this to immediately take you to the relevant screen. This may be a letter, a booking, a maintenance task, or simply one of the information screens.

View Record History

In addition to the Latest Activity, you also have the option to view the full history of each of your records. To do this, click on the View Record History button in the bottom right hand corner.

This will open a new window with initially a list of all of your owner records. From here you can use the search option to search or select the record you want, or the option to select from a number of additional tabs to switch to alternative record views.



Each of the tabs has its own search criteria allowing you to simply and quickly locate the record you are looking for. You also have the option to click on any of the column headings to change the search order of the records displayed.

Once you have found the record you require click on the blue underlined link to open the relevant history of this record.

From here, you also can open any letter links, or other linked records, just as you would if you were accessing the record history direct.

Event Of	Event Type	Event By	Event Time	Description
Letter	Deposit paid - guest	ian	09/09/2011 14:57	Mr John Sampson(jwoolley@yahoo.co.uk)
Letter	Deposit paid - guest	ian	09/09/2011 14:23	Mr Gerald Weston(jwoolley@yahoo.co.uk)
Letter	Deposit paid - guest	ian	09/09/2011 14:16	Mr Gerald Weston(jwoolley@yahoo.co.uk)
Letter	Deposit paid - guest	ian	09/09/2011 14:13	Mr Gerald Weston(jwoolley@yahoo.co.uk)
Letter	Booking confirmation	ian	28/06/2011 10:02	Mr John Sampson(jwoolley@yahoo.co.uk)
Letter	confirmation- paid in full	ian	28/06/2011 09:54	Mr John Sampson(jwoolley@yahoo.co.uk)
	Owner Added	ian	01/12/2010 16:48	New owner created: Rebecca

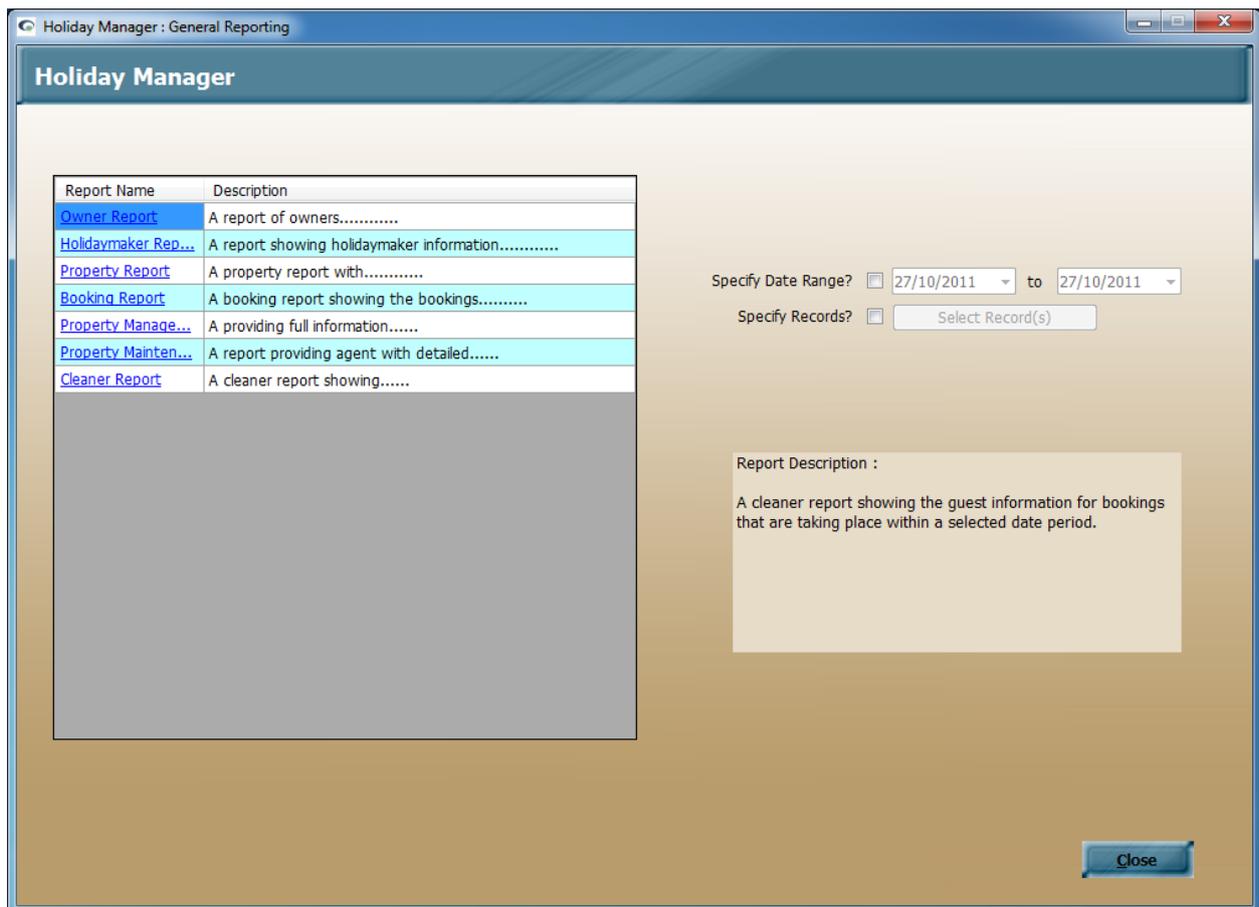
Cleaner Report

The new cleaner report has been designed to be produced as a single landscaped arrivals report to provide to the relevant contact to keep them apprised of the various arrivals and departures for a property, or group of properties.

On the main reporting page you have the option to specify a date range of the booking, or alternatively specify a record(s) to filter on.

Of particular note here is the ability to specify a maintenance company, and the report will only bring up the properties that are linked to this maintenance company via the maintenance section on the property screen.

This gives you a unique, personalised report that can be provided to the relevant maintenance company or cleaner with only the properties relevant to them.



Once you have selected your initial criteria and clicked on the report, you will have access to all the information on the main screen. Clicking on any of the headings will sort accordingly.

To control the fields that appear on your final report, check out the new report format option elsewhere in this document.

As usual you can generate letters/emails, SMS or reminders for all or a selection of the records that appear on the report.

Holiday Manager : Cleaner Report

Specify Additional Criteria: Status

Select	Prop ID	Prop Name	Add 1	Add 2	Town	Post Code	Booking ID	HMaker ID	Booking Made	Booking From	Boo To
<input checked="" type="checkbox"/>	P2010/0003	Rock Cottage	COAST ROAD		Mevagi...	TR27 3ER	B2010/0002	H2010/0001	06/12/2010	24/07/2011	31/0
<input checked="" type="checkbox"/>	P2010/0004	Eco Retreat	STAR LANE		St Ives	TR26 8QA	B2010/0003	H2010/0002	06/12/2010	12/02/2011	19/0
<input checked="" type="checkbox"/>	P2010/0003	Rock Cottage	COAST ROAD		Mevagi...	TR27 3ER	B2010/0004	H2010/0002	09/12/2010	02/01/2011	09/0
<input checked="" type="checkbox"/>	P2010/0008	Riverview	RIVER VIEW R...		Helford	TR26 2QP	B2010/0005	H2010/0001	30/12/2010	19/02/2011	26/0
<input checked="" type="checkbox"/>	P2010/0002	Towan Apart...	TOWAN APAR...		HAYLE	TR14 7TR	B2010/0006	H2010/0001	30/12/2010	25/02/2011	04/0
<input checked="" type="checkbox"/>	P2010/0002	Towan Apart...	TOWAN APAR...		HAYLE	TR14 7TR	B2010/0007	H2010/0002	30/12/2010	31/12/2010	07/0
<input checked="" type="checkbox"/>	P2010/0004	Eco Retreat	STAR LANE		St Ives	TR26 8QA	B2010/0008	H2010/0001	30/12/2010	08/01/2011	15/0
<input checked="" type="checkbox"/>	P2010/0003	Rock Cottage	COAST ROAD		Mevagi...	TR27 3ER	B2011/0001	H2010/0002	01/01/2011	13/02/2011	20/0
<input checked="" type="checkbox"/>	P2010/0010	Corner Lodge	TEHIDY		Cambo...	TR14 9IU	B2011/0002	H2010/0001	07/01/2011	05/03/2011	12/0
<input checked="" type="checkbox"/>	P2010/0003	Rock Cottage	COAST ROAD		Mevagi...	TR27 3ER	B2011/0003	H2010/0001	20/01/2011	23/01/2011	30/0
<input checked="" type="checkbox"/>	P2010/0003	Rock Cottage	COAST ROAD		Mevagi...	TR27 3ER	B2011/0004	H2010/0001	20/01/2011	06/03/2011	13/0
<input checked="" type="checkbox"/>	P2010/0003	Rock Cottage	COAST ROAD		Mevagi...	TR27 3ER	B2011/0005	H2010/0002	22/01/2011	20/03/2011	27/0
<input checked="" type="checkbox"/>	P2010/0001	The Lodge	COAST ROAD		Portreath	TR17 9EW	B2011/0006	H2011/0001	22/01/2011	26/03/2011	02/0
<input checked="" type="checkbox"/>	P2010/0003	Rock Cottage	COAST ROAD		Mevagi...	TR27 3ER	B2011/0007	H2011/0001	27/01/2011	24/04/2011	01/0

Generate letter

Generate SMS

Add reminder Priority Assign to Add

The report can be exported in various formats, printed or sent via email as required.

New Report Formatting

In order to be able to customise your reports you print/send/export, we have introduced a new formatting option.

When you access any of the standard reports, you now have an additional Format button at the bottom of the screen. When you click on this format option, you have a new section appear with a list of all of the output columns of this particular report. Each field has a tick box, which controls whether you wish this field to be included on the report.

Once saved, the system will remember these choices when you produce this particular report in future.

Holiday Manager : Owner Report

Holiday Manager

Show Column

Ref No Title House Name Town Home Phone Email
 Status First Name Address 1 County Work Phone
 Date Added Surname Address 2 PostCode Mobile

Save

Select	Ref No	Status	Date Added	Title	First Name	Surname	House Name	Address 1	Address 2
<input checked="" type="checkbox"/>	O2010/0001	Active	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	ABBEY 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 WALK
<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 reminder Priority Assign to Add

Format Report **Close** **Export** **Print** **Send**

Merge Codes

The following merge codes are now available on the system for the new caretaker record and the other new fields we have introduced on the system for this version.

Field	Prefix Code	Translation
PropPhone	#p_phone	Property Phone Number
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

Additional Linked Maintenance Options

Included with this version is the added facility to link a third maintenance company to the property. On the property screen Maintenance tab, you now have the option to specify a Property Cleaning, Property Maintenance and a Property Caretaker for each property.

This enables letters to be produced for linked contacts, produce arrival reports for linked maintenance companies and merge relevant linked maintenance information on letters.

To link a caretaker to a property simply click on the blue locate button and select the relevant maintenance company, add any notes that you want recorded for this and click the add button. This record will then appear in the bottom half of the screen. You can then tick the relevant box to show whether they are the preferred supplier for cleaning, general maintenance or caretaker. There is nothing to stop one maintenance company being selected for more than one of these options if required.

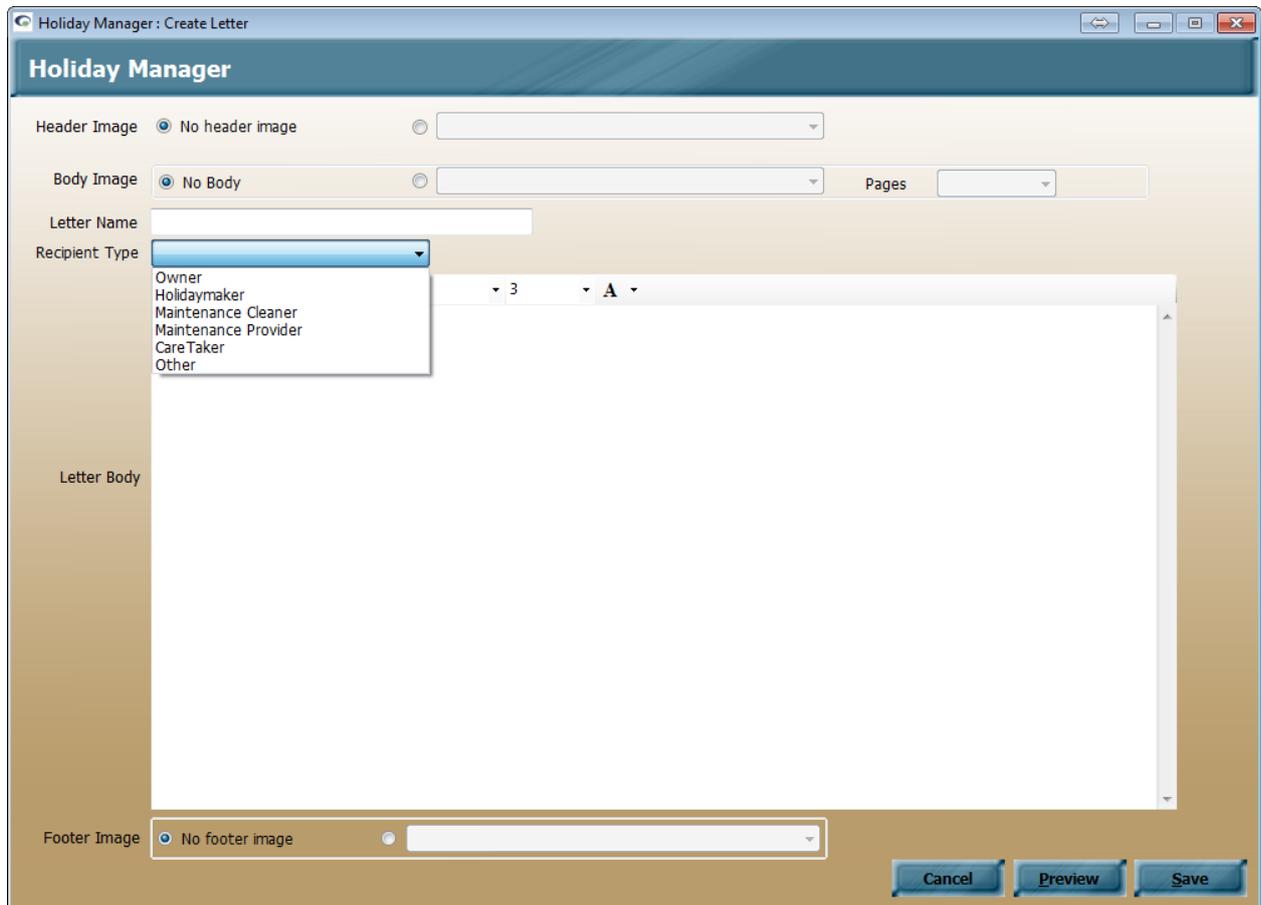
The screenshot shows the 'Holiday Manager' software interface for a property named 'Treetops'. The 'Maintenance' tab is active, displaying a table of linked maintenance companies. The table has columns for Ref No, Company Name, Trade, Notes, Property Cleaning, Property Maintenance, Property Caretaker, Job Sheet, and Action. One entry is visible: Ref No M2010/0001, Company Name Jo's Cleaning, Trade Cleaner, Notes 'main cleaner and maint...', Property Cleaning checked, Property Maintenance checked, Property Caretaker unchecked, Job Sheet 'Create', and Action 'Delete'. Below the table is a 'Caretaker' section with instructions to select a maintenance company to act as the caretaker. The bottom of the screen shows the date added (06/12/2010) and buttons for 'View Booking Schedule', 'Close', and 'Save'.

Ref No	Company Name	Trade	Notes	Property Cleaning	Property Maintenance	Property Caretaker	Job Sheet	Action
M2010/0001	Jo's Cleaning	Cleaner	main cleaner and maint...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create	Delete

Maintenance changes for Print/Send Document Section

As detailed in the above section, we have now added the option to include a third linked maintenance supplier to the property screen. To accommodate this we have also introduced some additional functionality for the letters, and in particular the automated letter section and Print/Send documents.

The first change you will notice is that the recipient type on the letters has now been expanded to include all three maintenance company options. When you are setting up the letter templates you can now specify which of your linked maintenance suppliers are going to receive this letter.



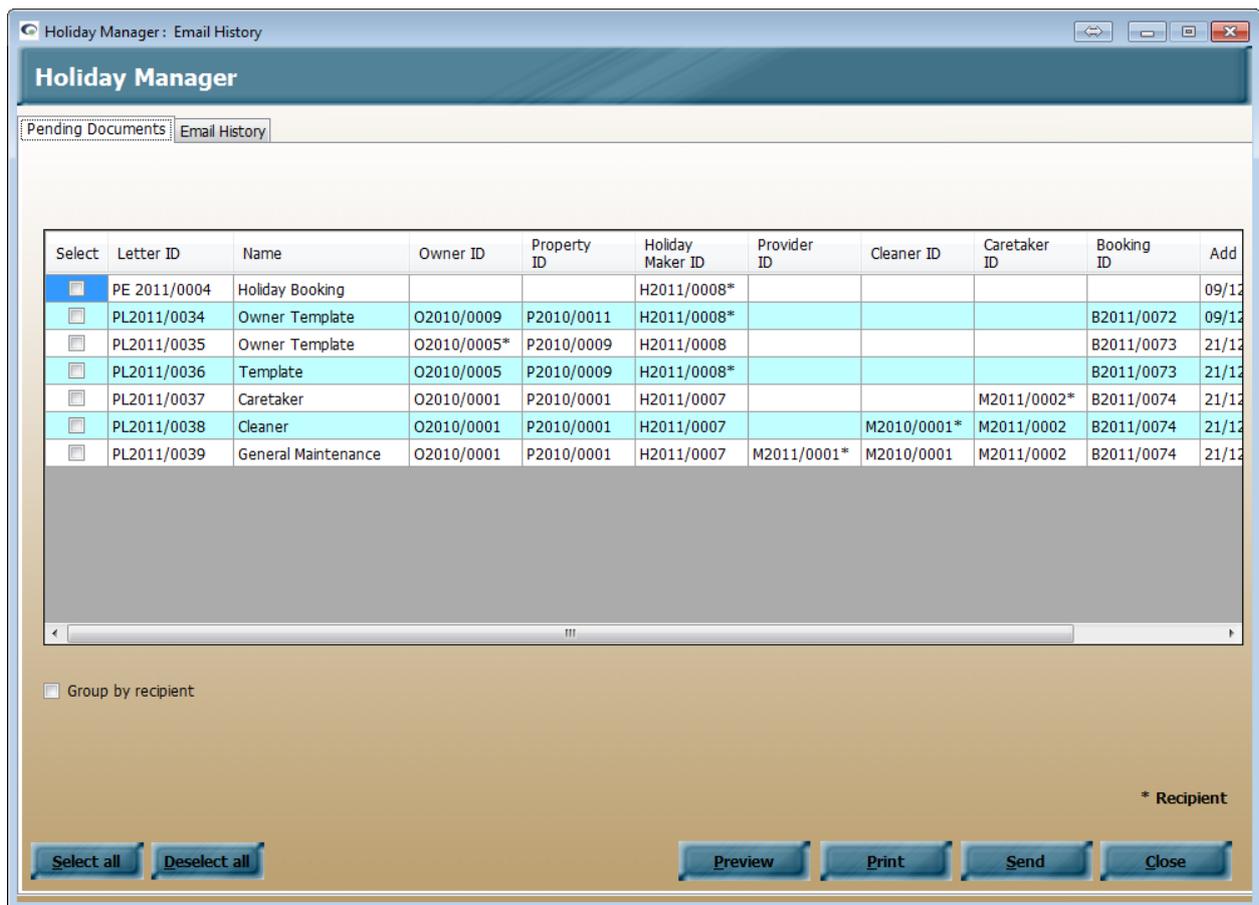
Once you have created your template letters and recipients, these can be merged and created in exactly the same way as you use the letters currently.

When a letter has been generated for one of the linked maintenance companies either via the automated letters, or added to the queue from the manual production of a letter, they will appear in the Print/Send document section.

You will notice that a few additional columns have been added in this section to accommodate this.

Instead of just the one maintenance company column, we now have three, the original general maintenance contact, plus an additional one for the cleaner and caretaker. This allows for three separate letters or combinations of these to be generated for each automated event.

For example, for a new booking we could generate a separate confirmation letter to be sent to the owner, holidaymaker, Maintenance Company, cleaner and caretaker.



The recipient of each letter is shown by the asterisk next to the record ID.

Information Screen Changes

We have now added a number of additional fields that have been requested to the main information screens. These help for monitoring and tracking purposes.

On the owner screen we now have a Source field.

This is an optional field that, if required, will allow you to select from a list of options to show the source of this new owner.

The options contained within the drop down list are controlled via the System Settings and the Enquiry Source on the Holidaymaker section.

Holiday Manager: Owner View/Edit

Holiday Manager Owner: Paul Status: LIVE

General Account Info Maintenance Providers Properties History Documentation Transactions

Ref No O2010/0001

Title Mr

First Name Paul

Surname Reed

Salutation <FIRST NAME>

House Name/Number 34

Address OSBORNE AVENUE
KNOWLE

Town Bristol

County

Post Code BS4 9UY

Country

Source

Home Phone 0117 923 235

Work Phone

Mobile Number 07500844361

Email 1 ijwoolley@yahoo.co.uk

Email 2

Email 3

Preferred No

Default

Send SMS Send Email Send Letter

Overseas

Notes

Date Added 01/12/2010 16:45

Cancel Save

Property Section

The property section also has the addition of a Source field to specify where the property has come from.

In addition, we also have a new property telephone number. This allows for the storing of a telephone number for the property itself, if applicable.

Holiday Manager : Property View/Edit

Holiday Manager Property Name: Eco Retreat Status: LIVE

General Marketing Information Photographs Maintenance Management Documentation Keys Transactions History Extras

Ref No P2010/0004
 Title Eco Retreat
 Locality St Ives
 Property Name/Number 67
 Address STAR LANE
 Town St Ives
 County
 Post Code TR26 8QA
 Country

Source
 Phone
 Commission Rate 15.00
 Booking Charge 0.00

Owner Ref	Owner Name	% Own
O2010/0004	Peter	50.00
O2010/0011	Julia	50.00

Add Owner

Notes
 Notes
 Notes
 Directions
 Directions

Date Added 02/12/2010

View Booking Schedule Close Save

Holidaymaker Section

On the holidaymaker section, we have added an optional age and date of birth section, to give you the choice of adding this information into the system.

On the next page, we have also added the option to remove unwanted credit cards. This allows out of date or unwanted credit cards to be removed from the system as and when required.

Holiday Manager: Holiday Maker View/Edit

Holiday Manager **Holiday Maker: Janet** Status: LIVE

General Payment Additional Party Members Documentation History Transactions

Ref No: H2011/0007 Enquiry Source: Referral

Title: Ms Day Telephone: Evening Telephone: Mobile Number 1: 123456 Mobile Number 2: Email 1: Email 2: Email 3: No In Party: 0 Pets: 0 Children: 0 Rating: 0

First Name: Janet House Name/number: 89 Consent Marketing: Send Brochure: Email List:

Surname: Heather Address: BOLTON WAY Send SMS: Send Email: Send Letter:

Salutation: <FIRST NAME> Town: Birmingham Date of Birth: 21/12/2011

Post Code: B18 6TR County: Country: Age: Car Reg: Default

General Information

Date Added: 05/10/2011 12:57

[Book Holiday](#) [Cancel](#) [Save](#)

Holiday Manager: Holiday Maker View/Edit

Holiday Manager **Holiday Maker: Zoe** Status: LIVE

General **Payment** Additional Party Members Documentation History Transactions

Add/ Edit Cards

Card No: ***** Card Type: American Express Name On Card: Ms ytgfhj Card Valid From: Dec/2011 Card Valid To: Dec/2010 Card Issue No: Security Code: Issuing Bank: Default Card:

[New](#)

Cards

Card Type	Name On Card	Card Valid To	Default Card	Delete
American Expr...	Ms ytgfhj	Dec/2010	<input checked="" type="checkbox"/>	Delete

Date Added: 06/12/2010 14:48

[Book Holiday](#) [Cancel](#) [Save](#)

Additional Changes

The address fields found throughout the program no longer Capitalise the full line of the address, they now simply capitalise the first letter of each word.