HLS Solutions Ltd
Update Notes

Version 2.0.18

Last Updated – 27th December 2011

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

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.
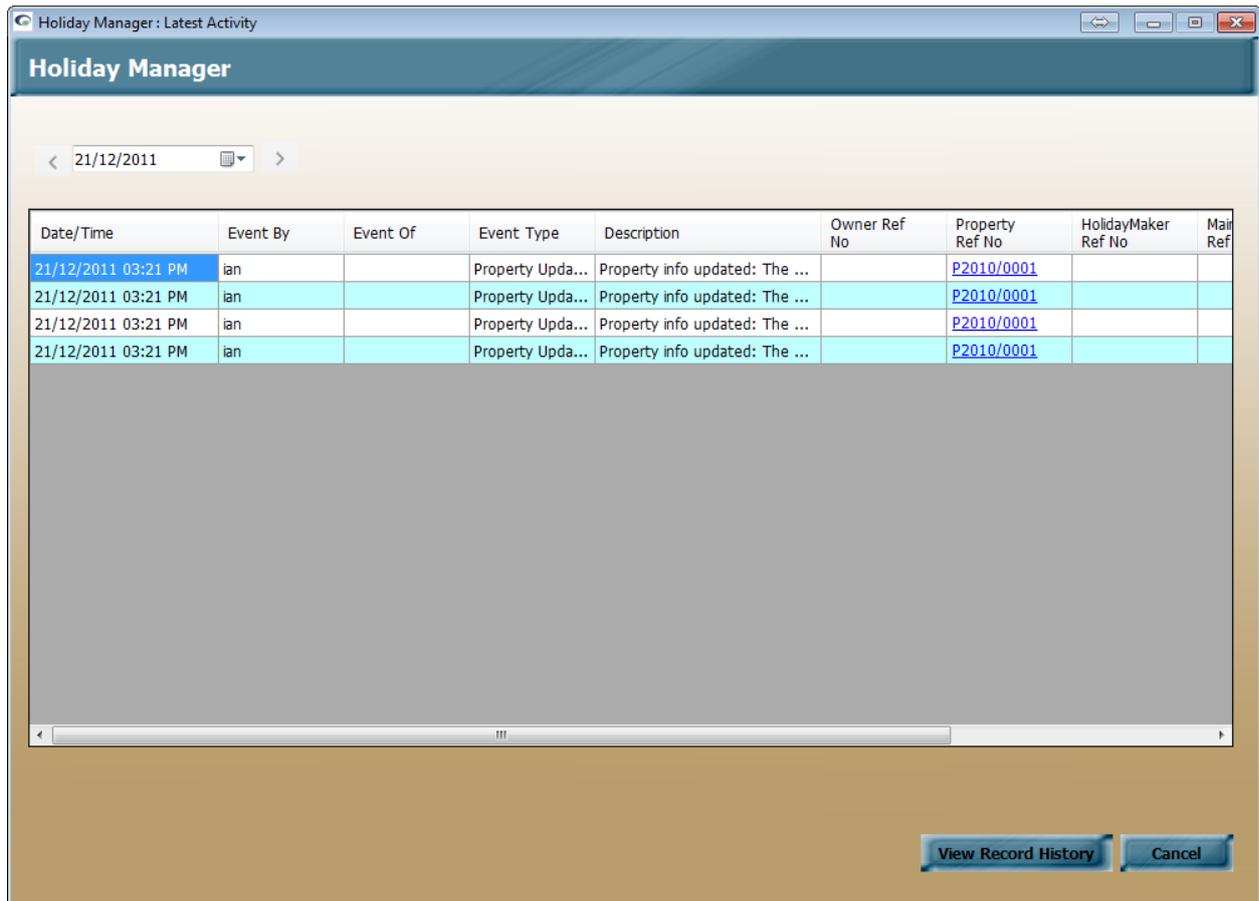

At any point you have a blue underlined link you can click on this to immediately take you to the relevant screen. This may be a letter, a booking, a maintenance task, or simply one of the information screens.

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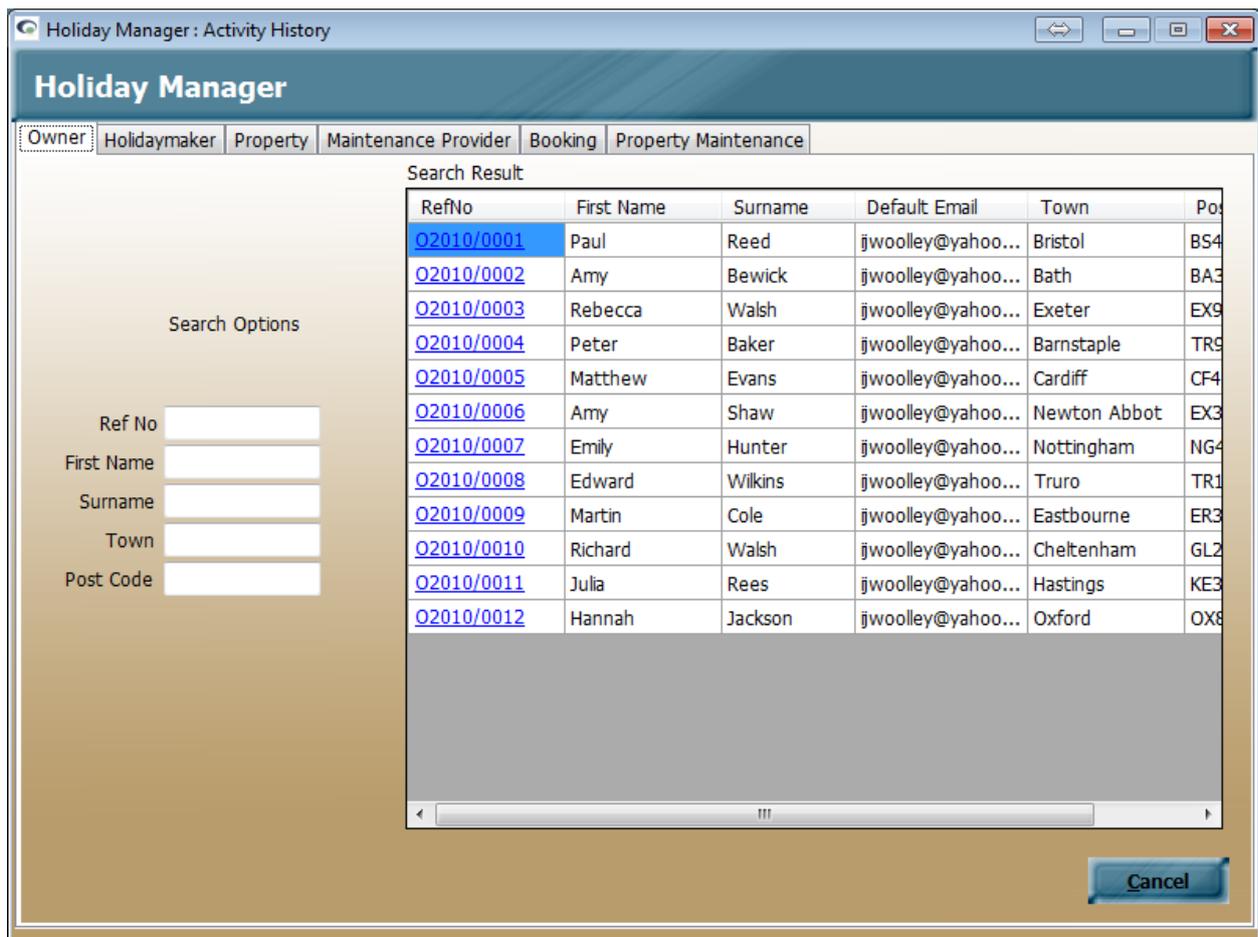
Each of the tabs has its own search criteria allowing you to simply and quickly locate the record you are looking for. You also have the option to click on any of the column headings to change the search order of the records displayed.

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.

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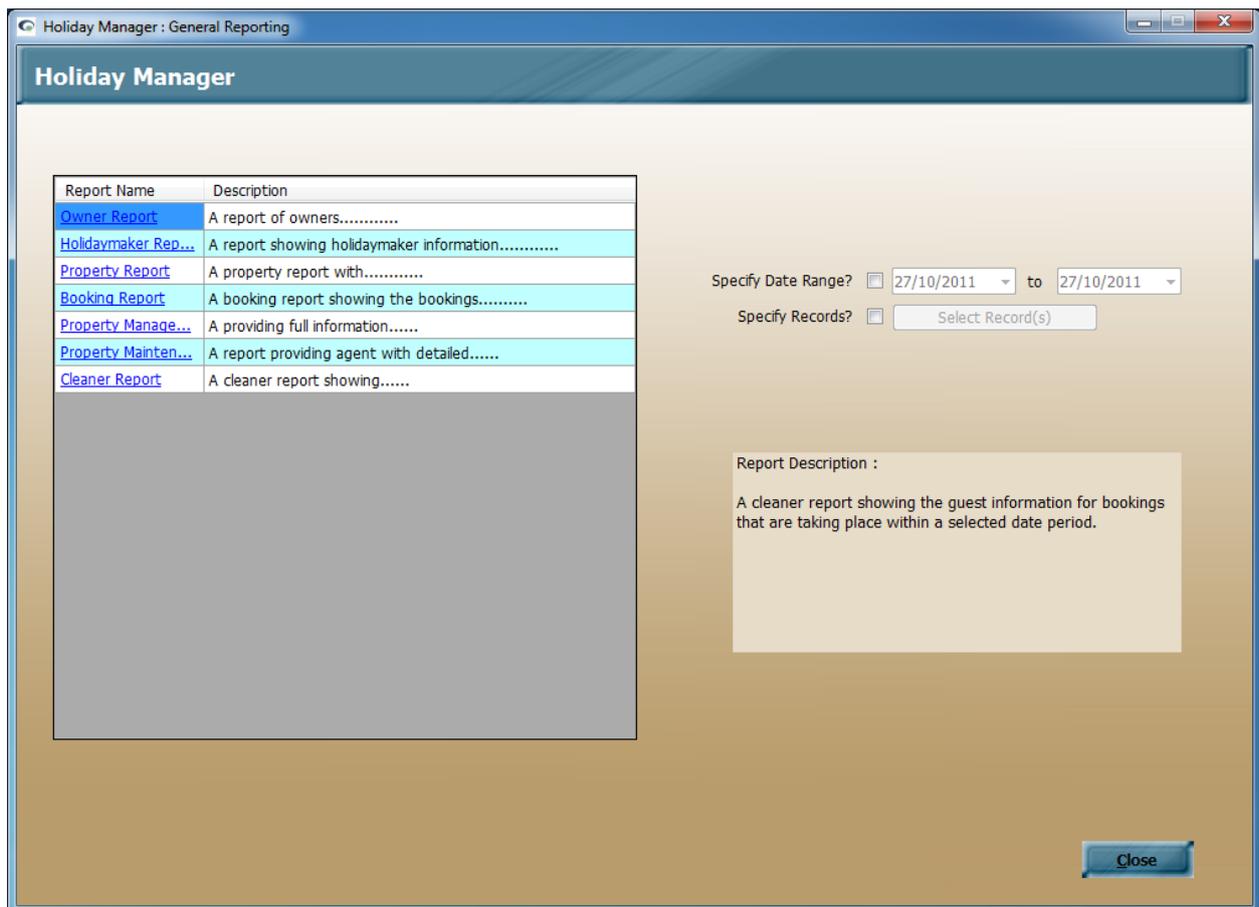
Once you have selected your initial criteria and clicked on the report, you will have access to all the information on the main screen. Clicking on any of the headings will sort accordingly.

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.

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.

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.

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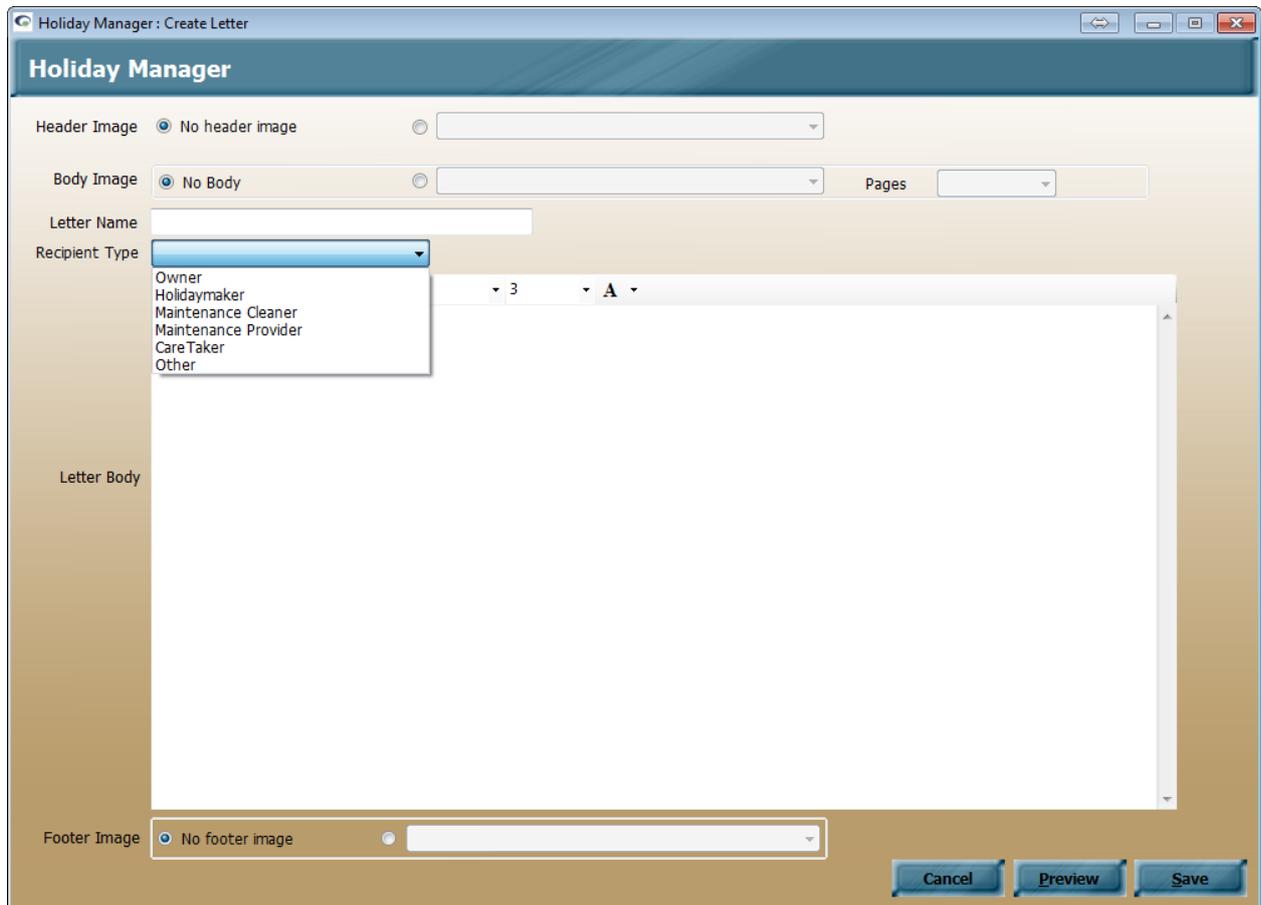
Once you have created your template letters and recipients, these can be merged and created in exactly the same way as you use the letters currently.

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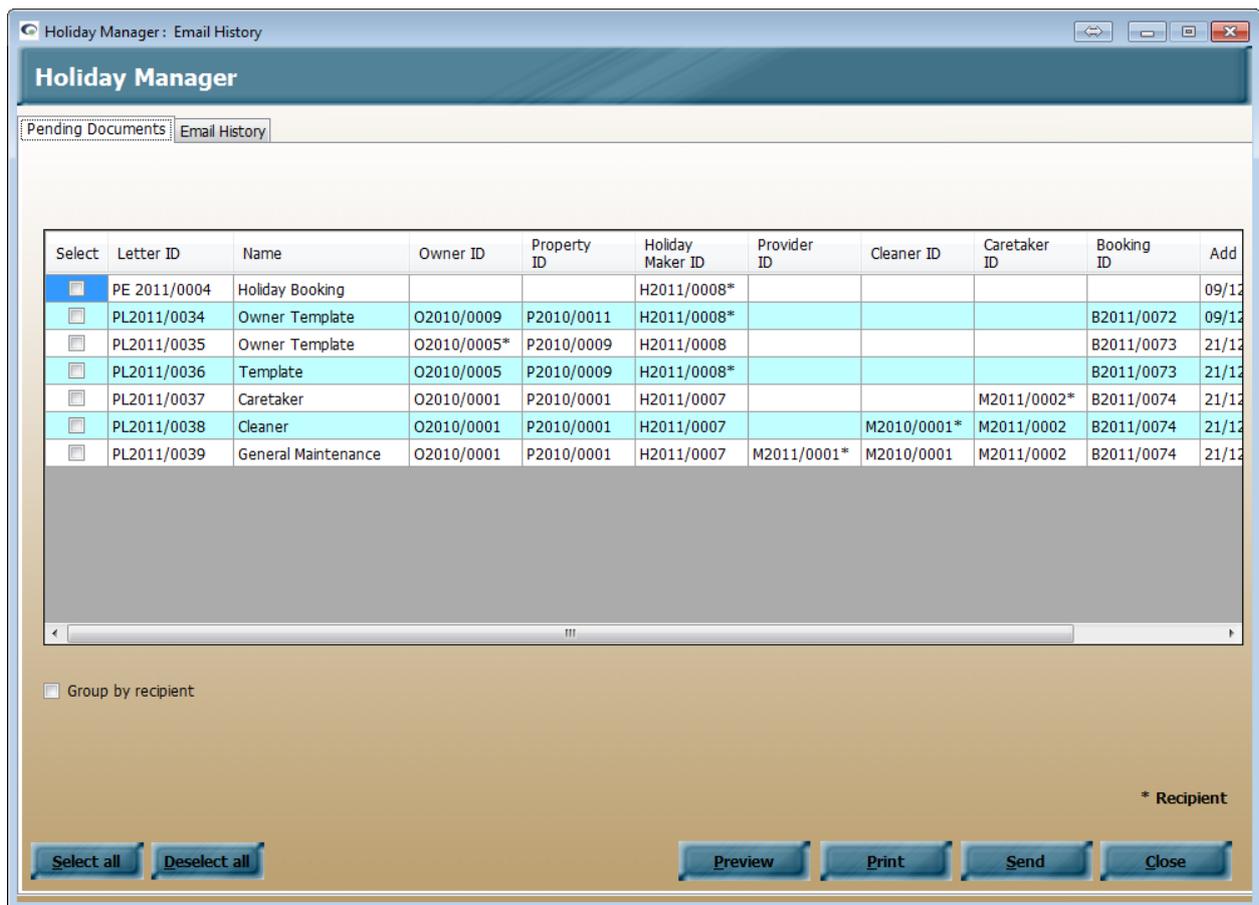
The recipient of each letter is shown by the asterisk next to the record ID.

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.

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.

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
Title: Ms
First Name: Janet
Surname: Heather
Salutation: <FIRST NAME>
House Name/number: 89
Address: BOLTON WAY
Town: Birmingham
County:
Post Code: B18 6TR
Country:
Date of Birth: 21/12/2011
Age:
Car Reg:

Enquiry Source: Referral
Day Telephone:
Evening Telephone:
Mobile Number 1: 123456
Mobile Number 2:
Email 1:
Email 2: ○ Default
Email 3:
No In Party: 0
Pets: 0
Children: 0
Rating: 0
Consent Marketing: ☐
Send Brochure: ☐
Email List: ☐

■ Send SMS   ■ Send Email   ■ Send Letter

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: *********   Show
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	☑	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.