



ResManager is an accommodation management software package designed specifically for the NHS. Copyright Olliver Communications 1997 to 2021 contact@ollivercomms.co.uk

Start ResManager

In your internet browser (e.g. Microsoft Edge, Google Chrome) select the bookmark (url) provided to you by your IT department. This will load the ResManager Dashboard page

User Authorisation

Viewing and changing data can be made only by authorised users.

No separate login is required as the application makes use of Windows Active Directory user groups to authorise users to perform different tasks within Resmanager. (There is also an audit trail to record the more important changes made and which user made them.) There are four user groups. Starting with the highest:

Accom_Admins Can do everything, at least two users should have this level.

All below plus access Settings (includes add new accommodation, change building names and site names, alter standard charge rates/increases, add payment methods, alter std letters/emails, view audit log and change miscellaneous options).


Accom_Finance All below plus manual finance transactions receipts and batch receipts.

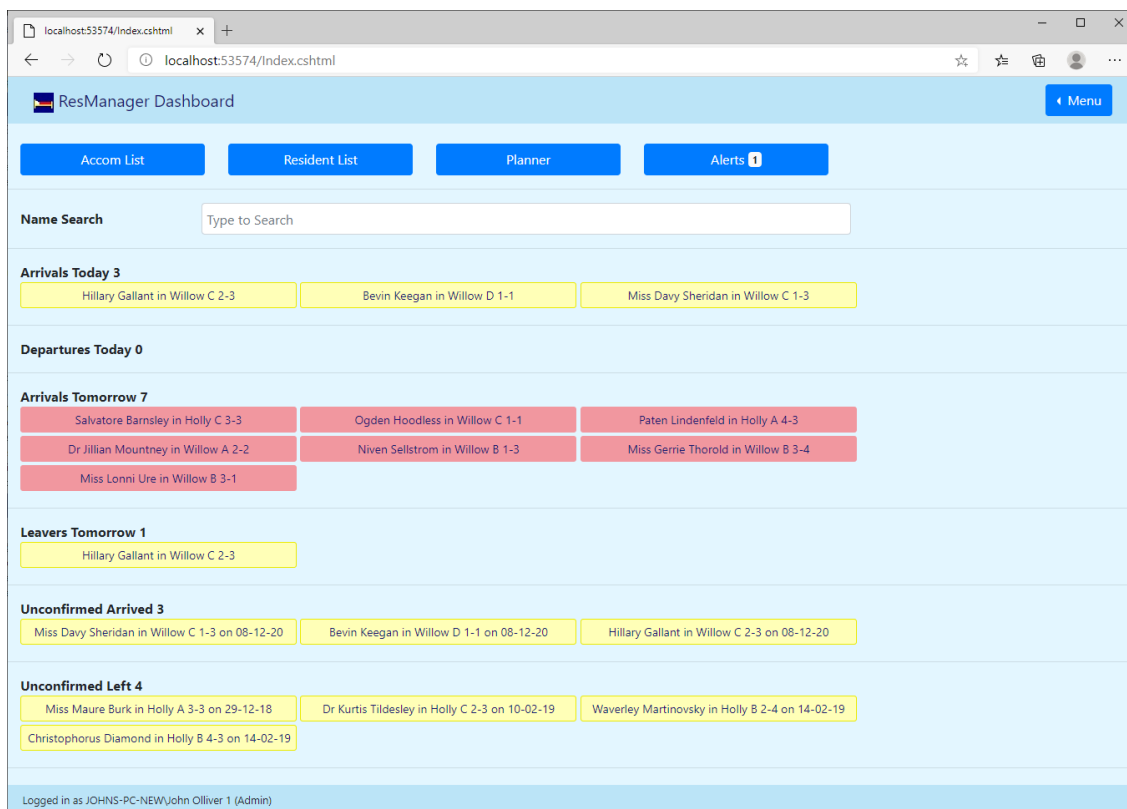
Accom_Users Read and change most day to day data.

Accom_Guests Read only of main views and lists.

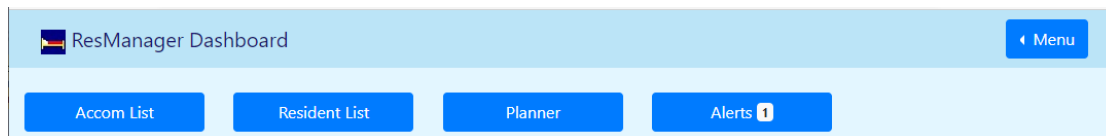
ResManager Dashboard

The Dashboard is the opening page.

It is also the default 'home' page if the blue/red Resmanager icon  (at the top left hand corner of every page) is clicked.



Navigation Buttons



Buttons provide direct access to the most commonly used pages: Accommodation List, Resident List, Accommodation Planner and Alerts List. The Alerts List displays a badge showing the number of current Alerts.

Bookings displayed on this page

Arrivals and departures for today and tomorrow
Also all unconfirmed arrivals and departures

Click once on any name/booking button e.g. to Ogden Hoodless in Willow C 1-1 go to the relevant Booking Details page.

Button colours

These indicate the booking status:

Ogden Hoodless in Willow C 1-1

Red – booked, i.e. future resident

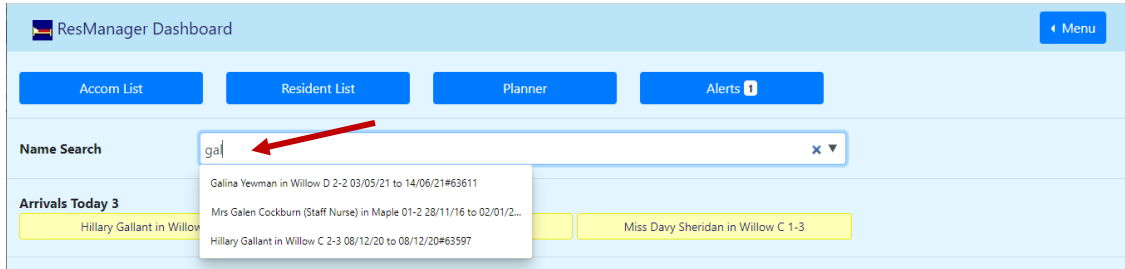
Mr Archibaldo Duly 25-05-18 24-06-21

Blue – current resident

Salvatore Barnsley in Holly C 3-3

Yellow – unconfirmed arrival or departure

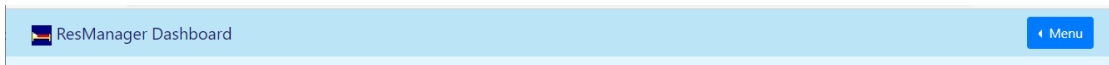
Name Search



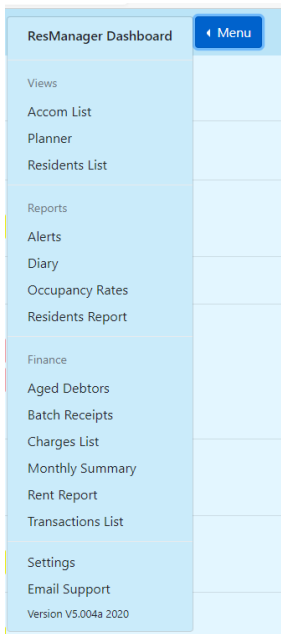
Typing in the search box will trigger a search (after a minimum three characters) for any current or booked resident with a partial match of their forename or surname. By default only residents who left within the last 720 days will be searched – this number of days can be changed in the Settings (Menu – Settings – Options – ResTypeAheadDays). A lower number will speed the search response up, a larger number will slow the search response down.

Click on a name /booking entry in the dropdown list to go direct to the Booking Details page.

Menu



The Menu dropdown list is located at the top right hand corner of every page. This is the primary site navigation tool.



Note: Depending on the permissions granted to you as a user some of these menu options will be hidden.

Caution: The back/forward arrows on your browser may be used to navigate but this will take you to the last page viewed as cached by your browser,so it may very well not reflect the up to date information.

Accommodation List

The Accommodation list shows all units of accommodation vertically, alongside side each is a coloured button displaying the current resident if any (blue button) and each booked/future resident if any (red button). Unconfirmed arrivals in departures in yellow. Closed rooms are grey.

Willow D 2-3	New	Dr Cyrille Maccaddie 11-12-20 12-12-20	
Willow D 2-4	New	Axel Champley 03-08-20 19-07-21	
Willow D 3-1	New	Dr Rooney Cran 06-08-20 20-06-21	
Willow D 3-2	New	Symon Kemmey 10-12-20 18-12-20	
Willow D 3-3	New	Mrs Maureen Vayro 14-08-20 22-05-21	
Willow D 3-4	New	Colene Bachnic 17-07-18 21-02-21	Dr Patsy Hamley 13-03-21 30-03-21
Willow D 4-1	New	Miss Zondra Bridgewater 01-07-18 04-02-21	Dr Randell Matias 24-02-21 13-04-21
Willow D 4-2	New	Redecoration 01-12-20 29-01-21	

The order that units are displayed in is usually alphanumeric but the order for each unit can be specified in Settings.

If there is no current resident displayed to the right of a unit of accommodation then the room is unoccupied.

Maple 07-1	New		
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Booking Details

Beech B 1-2	New	Mr Archibaldo Duly 25-05-18 24-06-21	Dr John Smith 07-07-21 07-07-21	Lynnell Di Biasio 11-07-21 19-07-21
-------------	-----	--------------------------------------	---------------------------------	-------------------------------------

Click once on any name/booking button to go to the Booking Details page for that booking.

New Booking

Beech B 1-2	New	Mr Archibaldo Duly 25-05-18 24-06-21	Dr John Smith 07-07-21 07-07-21	Lynnell Di Biasio 11-07-21 19-07-21
-------------	-----	--------------------------------------	---------------------------------	-------------------------------------

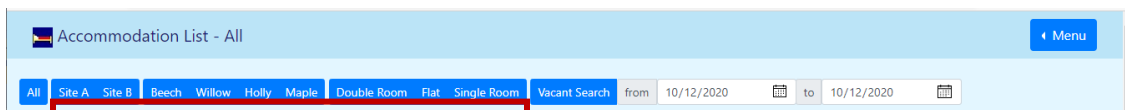
Click once on the green **New** button to open an empty Booking Details form for that property.

Accommodation Details

Beech B 1-2	New	Mr Archibaldo Duly 25-05-18 24-06-21	Dr John Smith 07-07-21 07-07-21	Lynnell Di Biasio 11-07-21 19-07-21
-------------	-----	--------------------------------------	---------------------------------	-------------------------------------

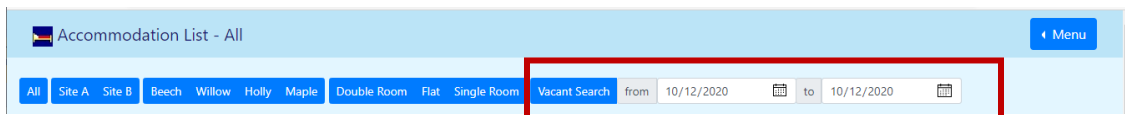
Click once on the light blue property button to open the Accommodation Details page for that property.

Filter Buttons



Click once on one of the blue filter buttons to show properties from only one site or one building or if one property type.

■ Vacant Search



Click on the Vacant Search button to show all properties vacant between the two dates (default is today's date). You cannot combine the Vacant Search with other the filters.

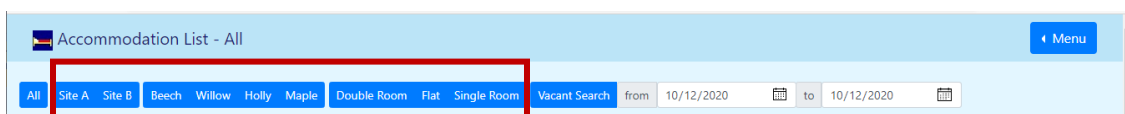
Accommodation Planner

The Accommodation Planner is a graphical, spreadsheet like, day by day view of each room's usage. It provides the visual information that a holiday planner provides and is particularly useful for finding empty periods visually. It is also useful for selecting the best room to book a resident into to make sure that residents arrive and leave as near to 'back-to-back' as possible.

Each day is represented by a coloured cell, the colour depends on the booking status:

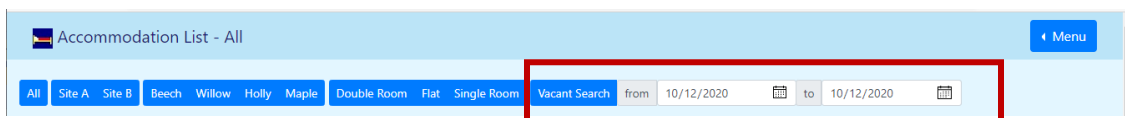
RedThe default display is all rooms for the next 60 days.

■ Filter Buttons



Click once on one of the blue filter buttons to show properties from only one site or one building or if one property type.

■ Vacant Search

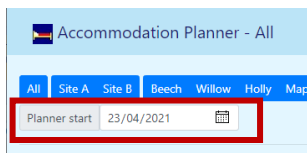


Click on the Vacant Search button to show all properties vacant between the two dates (default is today's date). You cannot combine the Vacant Search with other the filters.

■ Planner Start

The start date for the display can be extended forward (but not backwards).

17/12/2020



Hover the mouse over a cell to inspect the resident name and booking dates (or if relevant the closure reason and dates).

The screenshot shows a grid of booking cells for four properties: Holly A 4-1, Holly A 4-2, Holly A 4-3, and Holly A 4-4. Each row starts with a 'New' button. A tooltip is displayed over a cell in the Holly A 4-3 row, showing the resident name 'Amandi Charwood' and booking dates '28-03-16 04-04-21'. The cells are color-coded: red for cancellations, blue for bookings, and yellow for other statuses.

■ Booking Details



Click once on any cell to go to the Booking Details page for that booking.

■ New Booking



Click once on the green **New** button to open an empty Booking Details form for that property.

■ Accommodation Details



Click once on the light blue property button to open the Accommodation Details page for that property.

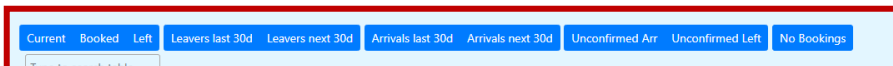
Resident list

The default view is all current residents in alphabetical order by surname.

Click on any row to go the Booking Details page.

Click on the column heading to sort.

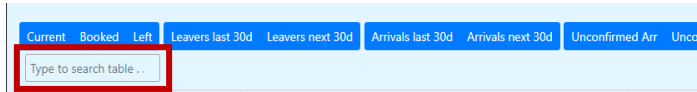
■ Filter Buttons



Current, Booked or Left residents

Leavers or Arrivals in the next or last 30 days
Unconfirmed Arrivals or Departures
Residents who have never had any bookings.

Search Bar



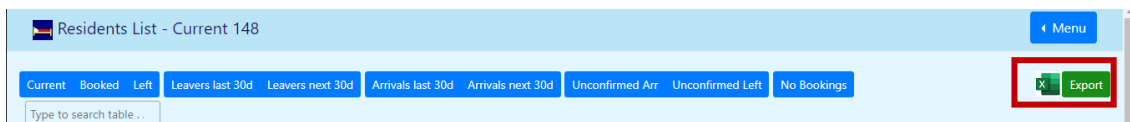
Type to show only those residents in the list where one of the fields contains those characters or numbers.

Surname Alphabet Bar Search

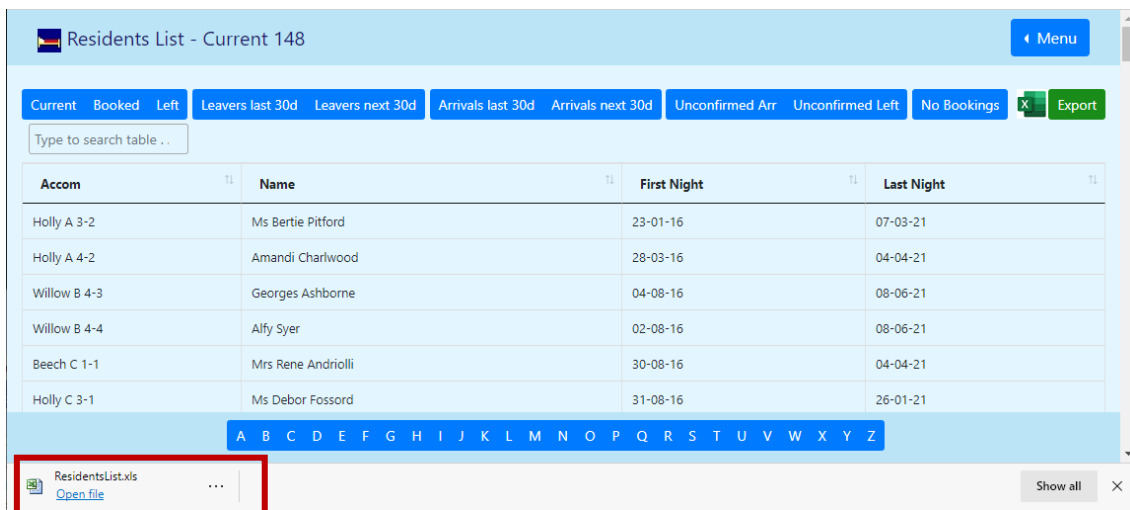


Click on a letter of the alphabet bar at the bottom of the page to show only those residents (in the list currently being displayed) whose surnames begin with the selected letter of the alphabet.

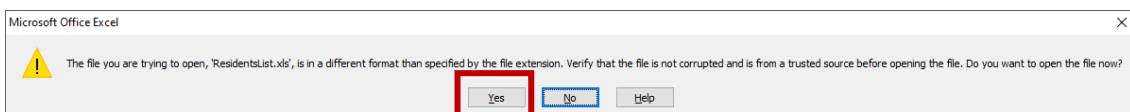
Export to Excel



Click to download the list in Excel format.



Your browser should prompt you to open the file or indicate where it has been saved. On attempting to open the file Excel may display a warning such as:



Click Yes to open in Excel.

Batch Receipts

Use the Batch Receipts page to mark multiple charges as paid (ie without having to go to each resident's account to make an individual Rent Receipt entry), for example where a list of salary deductions is received.

The screenshot shows the 'Batch Receipts' page with a search filter set to 'Payroll' from '01/07/2016' to '31/07/2016'. The table below shows the results:

Resident Ref	Date	Resident	Amount	Amount Paid
5169	01-07-2016	Bloxsom, Dottie	482.54	<input type="text"/>
5169	01-07-2016	Bloxsom, Dottie	25.00	<input type="text" value="25.00"/>
5303	01-07-2016	Charlwood, Amandi	482.54	<input type="text" value="482.54"/>
5303	01-07-2016	Charlwood, Amandi	25.00	<input type="text" value="10.00"/>
5270	01-07-2016	Cumes, Lazaro	482.54	<input type="text"/>
5270	01-07-2016	Cumes, Lazaro	25.00	<input type="text"/>
5301	01-07-2016	Durning, Gilberte	482.54	<input type="text"/>

At the bottom of the page, a green button displays: **Post Batch: Payments 3, Total 517.54**

This is a partial screenshot of the 'Batch Receipts' page, showing the search filter set to 'Payroll' from '01/07/2016' to '31/07/2016'.

Select the payment method and the dates covering the charges in question. Click Search.

This is a partial screenshot of the 'Batch Receipts' page, showing the 'Batch Ref' field set to 'Batch 10-12-2020' and the 'Payment Date' field set to '10/12/2020'.

Enter a Batch Reference. This will be recorded in the Transaction Description field for each receipt posted).

Enter a payment date in the Date of Receipt box. This should be the date the batch payment was actually made (e.g. the date salary deductions were made).

This is a partial screenshot of the 'Batch Receipts' page, showing the 'Amount Paid' column with input fields for each row.

Resident Ref	Date	Resident	Amount	Amount Paid
5169	01-07-2016	Bloxsom, Dottie	482.54	<input type="text"/>
5169	01-07-2016	Bloxsom, Dottie	25.00	<input type="text" value="25.00"/>
5303	01-07-2016	Charlwood, Amandi	482.54	<input type="text" value="482.54"/>
5303	01-07-2016	Charlwood, Amandi	25.00	<input type="text" value="10.00"/>

Double click each row to record a full receipt of the charge amount displayed.

Alternatively enter a different amount in the Amount Paid box.

This is a partial screenshot of the 'Batch Receipts' page, showing the green summary button at the bottom: **Post Batch: Payments 3, Total 517.54**

A running total of the value and number of receipts entered is displayed on the green button at the bottom of the page.

When completed click the green button to post all receipts made and open the Transactions List page displaying the receipts that have just been made. There will be one transaction for each receipt.

Alerts List

This lists all Alerts for all Bookings where the Alert Date in Booking Details is today or earlier and the Alert Active box is ticked. The Booking Note from Booking Details is displayed together with the Accommodation and Resident.

To cancel the alert click on the alert row to go to the Booking Details page and untick the Alert Active box. By default the list is sorted by date (most recent Alert Date first) but can also be sorted by clicking on the column heading.

Diary Arrivals & Departures



This lists all Arrivals and Departures over the next four weeks. The start date can be changed.

Click once on any name/booking button to go to the relevant Booking Details page.

From	12/12/2020	
Arrive Sat 12 Dec	Dr Bidget Nolton in Maple 06-1	Depart Sat 12 Dec
Arrive Sun 13 Dec	Miss Gavin Idle in Willow A 4-1	Dr Cyrilie Maccaddie in Willow D 2-3
		Miss Andriette Roderighi in Maple 09-2
		Miss Gerrie Thorold in Willow B 3-4
Arrive Mon 14 Dec	Dr Tawnya Shellum in Holly C 1-1	Maegan Eyril in Beech D 2-4
Depart Mon 14 Dec		
Arrive Tue 15 Dec	Pippa Kellog in Willow A 4-3	Dr Tawnya Shellum in Holly C 1-1
Depart Tue 15 Dec		

Occupancy Rates

This calculates the occupancy rates (number of properties, % occupied, % closed, % vacant) by site, building and accommodation type over the period selected (default today). The report can be exported to Excel.

from  to  [Submit](#)

 [Export](#)

		Properties	Occupied	Closed	Vacant
All Sites	All Buildings	182	82.97%	0.55%	16.48%
Site A	Beech	40	107.50%	0.00%	-7.50%
Site A	Holly	48	64.58%	0.00%	35.42%
Site A	All Buildings	88	84.09%	0.00%	15.91%
Site B	Maple	30	73.33%	0.00%	26.67%
Site B	Willow	64	85.94%	1.56%	12.50%
Site B	All Buildings	94	81.91%	1.06%	17.02%
	Double Room	25	92.00%	0.00%	8.00%
	Flat	34	76.47%	0.00%	23.53%
	Single Room	123	82.93%	0.81%	16.26%
All Sites	All Accom Types	182	82.97%	0.55%	16.48%
Site A	Double Room	15	100.00%	0.00%	0.00%
Site A	Flat	16	81.25%	0.00%	18.75%
Site A	Single Room	57	80.70%	0.00%	19.30%
Site A	All Accom Types	88	84.09%	0.00%	15.91%
Site B	Double Room	10	80.00%	0.00%	20.00%
Site B	Flat	18	72.22%	0.00%	27.78%
Site B	Single Room	66	84.85%	1.52%	13.64%
Site B	All Accom Types	94	81.91%	1.06%	17.02%

Period 12/12/2020 to 12/12/2020

Residents Report

A more complex report selectable by booking status, job title, department, organisation, staff group, tenancy type, accommodation type, building and site.

Residents Report Menu

Status: Current | All Job Titles | All Departments | All Organisations | All Staff Groups | All Tenancies | Export

All Accom Types | All Buildings | All Sites | Sort by: Surname | Search | Email All

Show/Hide: Job Title - Department - Organisation - Staff Group - Tenancy - Sex - DoB - Employee No - Mobile No - Work No - Email 1 - Email 2 - Vehicle - Building - Site - Accom Type - Res Note - Booking Ref - Resident Ref

Type to search table ..

Title	Forenames	Surname	Accom	First Night	Last Night	Job Title	Department	Organisation	Staff Group
Ms	Bertie	Pitford	Holly A 3-2	23-01-2016	07-03-2021		Post Grad	University C	Student
	Amandi	Charlwood	Holly A 4-2	28-03-2016	04-04-2021		Rehab		
	Georges	Ashborne	Willow B 4-3	04-08-2016	08-06-2021			University A	Nursing
	Alfy	Syer	Willow B 4-4	02-08-2016	08-06-2021			University A	Student
Mrs	Rene	Andriolli	Beech C 1-	30-08-2016	04-04-2021	Nurse		Hospital	Nursing

Total 151

Data fields can be shown or hidden.

The report can be searched via a text box.

All columns are sortable by clicking on the column heading.

The report can be exported to Excel.

An email can be generated by clicking on the Email All button. The user's email client will be opened and all emails (from the Resident Details Email 1 field will be inserted as 'blind' copy recipients. The user can then the email message required.

Aged Debtors

Debt and credit balances aged by month. By default the list covers only Current residents but All residents and Left residents can be selected.

Aged Debtors List - Current Menu

Current | Left | All | Export

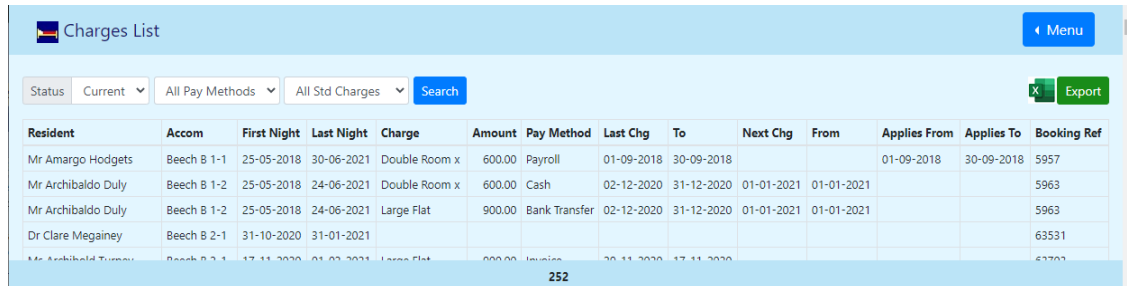
Resident Ref	Name	Balance	Dec-20	Nov-20	Oct-20	Older
5937	Randi Abela	-53.30	-	-	-	-
6116	Dr Ancell Addionizio	16,691.12	600.00	1,056.00	1,488.00	13,547.12
5495	Mrs Rene Andriolli	21,925.08	525.00	525.00	3,550.00	17,325.08
5355	Dr Lacey Annear	491.66	-	-	-	491.66

Total £1,666,084.30, Dec-20 £50,925.01, Nov-20 £69,845.94, Oct-20 £59,889.77, Older £1,489,696.04

The list can be exported to Excel.

Charges List

By default a list of Current Residents showing their name and accommodation together with the charges they have allocated to their booking (if any).



The screenshot shows a web interface titled 'Charges List'. At the top right is a 'Menu' button. Below the title are filters: 'Status' (Current), 'All Pay Methods', 'All Std Charges', and a 'Search' button. An 'Export' button is also present. The main content is a table with the following columns: Resident, Accommodation, First Night, Last Night, Charge, Amount, Pay Method, Last Chg, To, Next Chg, From, Applies From, Applies To, and Booking Ref. The table contains several rows of data for different residents and their charges.

Resident	Accom	First Night	Last Night	Charge	Amount	Pay Method	Last Chg	To	Next Chg	From	Applies From	Applies To	Booking Ref
Mr Amargo Hodgets	Beech B 1-1	25-05-2018	30-06-2021	Double Room x	600.00	Payroll	01-09-2018	30-09-2018			01-09-2018	30-09-2018	5957
Mr Archibaldo Duly	Beech B 1-2	25-05-2018	24-06-2021	Double Room x	600.00	Cash	02-12-2020	31-12-2020	01-01-2021	01-01-2021			5963
Mr Archibaldo Duly	Beech B 1-2	25-05-2018	24-06-2021	Large Flat	900.00	Bank Transfer	02-12-2020	31-12-2020	01-01-2021	01-01-2021			5963
Dr Clare Megainey	Beech B 2-1	31-10-2020	31-01-2021										63531
Mr Archibaldo Duly	Beech B 2-1	17-11-2020	01-02-2021	Large Flat	600.00		20-11-2020	17-11-2020					63703

The list shows how the charge is collected, when the last charge was made, when the next charge is due and whether the charge applies from or to dates other than the default (first night to last night).

The list can be filtered to apply to Booked or Left residents instead of Current and can be filtered further to show only those who pay by a selected method or who pay a selected charge name.

Click once on any row to go to the relevant Booking Details page.

The list can be exported to Excel.

Monthly Transaction Summary

TRANSACTION SUMMARY FOR MONTH ENDING 30/11/2020	
CHARGES FOR MONTH	
Payment Method: Bank Transfer	19,522.18
Payment Method: Cash	2,048.64
Payment Method: Invoice	17,786.04
Payment Method: Payroll	17,425.88
Payment Method: SO	21,835.22
All Payment Methods	78,617.96
Site: n/a	1,233.30
Site: Site A	50,063.63
Site: Site B	27,321.03
All Sites	78,617.96
Building: n/a	1,233.30
Building: Beech	20,521.98
Building: Holly	29,541.65
Building: Maple	10,853.22
Building: Willow	16,467.81
All Buildings	78,617.96
Type: n/a	1,233.30
Type: Double Room	13,932.12
Type: Flat	9,116.10
Type: Single Room	54,336.44
All Types	78,617.96
RECEIPTS AND REFUNDS	
Receipts	-2,856.00
Refunds	456.00
12-12-2020 15:01	

A summary for the current month of:

- Charges by payment method
- Charges by site
- Charges by building
- Charges by type of accommodation
- Receipts
- Refunds

Any of the last 12 months can be selected.

The summary can be exported to Excel.

Monthly Rent Report by Payment Method

A rent report for the current month showing all charges made (rent, council tax and service charge) grouped into sections by payment method.

17/12/2020

Monthly Rent Report by Payment Method Menu

Month Ending: 30/11/2020 Payment Method: All Payment Methods Search X Export

12-12-2020 15:06 RENT REPORT FOR MONTH ENDING 30/11/2020

Date	Resident	Description	Amount	Empl No	Res ID
Payment by Bank Transfer					
01-11-2020	Dr Ancell Addionizio	Double Room £600.00 PM Willow B 2-4 01-11-20 30-11-20 #6116	600.00		6116
01-11-2020	Georges Ashborne	Double Room £600.00 PM Willow B 4-3 01-11-20 30-11-20 #5415	600.00		5415
01-11-2020	Lianna Bockin	Double Room £600.00 PM Willow A 1-4 01-11-20 30-11-20 #5650	600.00		5650
01-11-2020	Dr Trumaine Bowlands	Double Room £600.00 PM Willow C 4-2 01-11-20 30-11-20 #6115	600.00		6145

134 Transactions, Total 69,472.62

The Monthly Rent Report shows:

- Transaction date
- Resident
- Transaction description (including accommodation and period)
- Amount charged
- Employer No (a unique number to assist identification)
- Resident Reference (a unique number to assist identification)

Any of the last 12 months can be selected.

The report can be filtered to show only one payment method.

The report can be exported to Excel.

Click on a row to go to the resident's account page.

Transactions List

Financial transactions (by default all charges, all payment methods for the last month)

Transactions List Menu

All Charges All Pay Methods from 12/11/2020 to 12/12/2020 Search X Export

Date	Resident	Description	Amount	Method	Type	Res ID
13-11-2020	Ingrid Salvadore	Double Room x £600.00 PM Holly B 4-4 01-10-20 31-10-20 #6028	600.00	Invoice	Rent	6028
13-11-2020	Ingrid Salvadore	Double Room x £600.00 PM Holly B 4-4 01-11-20 06-11-20 #6028	118.36	Invoice	Rent	6028
29-11-2020	Mr Archibaldo Duly	Large Flat £900.00 PM Beech B 1-2 25-05-18 31-05-18 #5963	207.12	Bank Transfer	Rent	5963
29-11-2020	Mr Archibaldo Duly	Large Flat £900.00 PM Beech R 1-2 01-06-18 30-06-18 #5963	900.00	Bank Transfer	Rent	5963

106 Transactions, Total £60,051.18

Transactions can be filtered by:

- Type of charge (All Charges, Rent, Council Tax, Service Charge, Deposit, Receipts)
- Payment method (All or individual)
- Period (transactions made between two dates selected)

17/12/2020

The report can be exported to Excel.

Click on a row to go to the resident's account page.

Settings

This page and the pages it directs to are restricted to Active Directory Resmanager_Admins users.




Settings - Add Accommodation

The Accom Code must be unique.

The Type can be selected from the list or a new one can be typed into the box.

The Building must be selected from the list

The two 'Notes' fields are optional.

 Accommodation Details [← Menu](#)

Accom Details [Bookings](#) [Closures](#)

Accom Code


Type

Building

Report Note

Long Notes

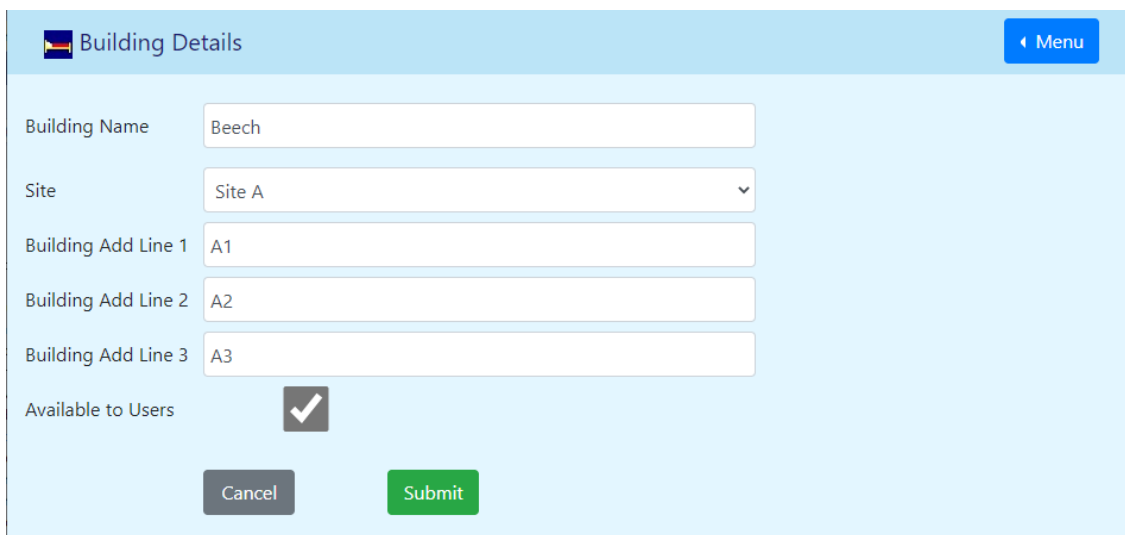
Settings - Buildings

 Buildings List [← Menu](#)

Building ID	Building Name
93	Beech
680	Holly
681	Maple
679	Willow

Click on a row to change an existing building's name, site or address details.

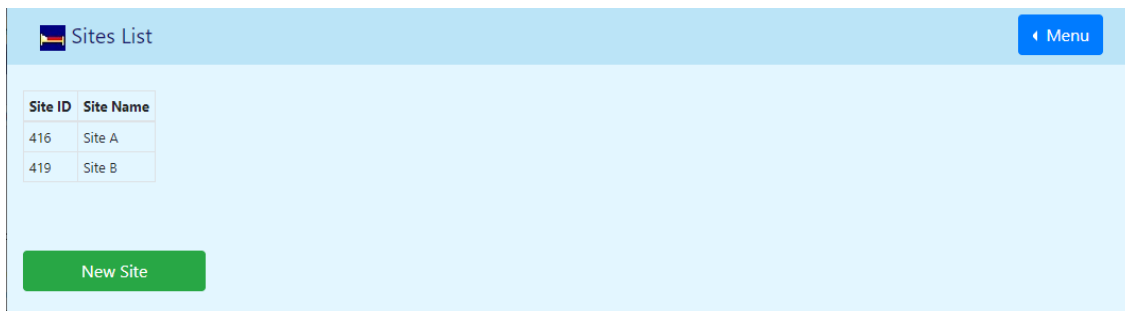
Click the New Building button to add a new one.



The Building Name must be unique.

If the 'Available to Users' box is unticked then the building will not appear as one of the filter buttons at the top of the Accommodation List or Accommodation Planner and will not be included in the Building filter list in the Residents Report.

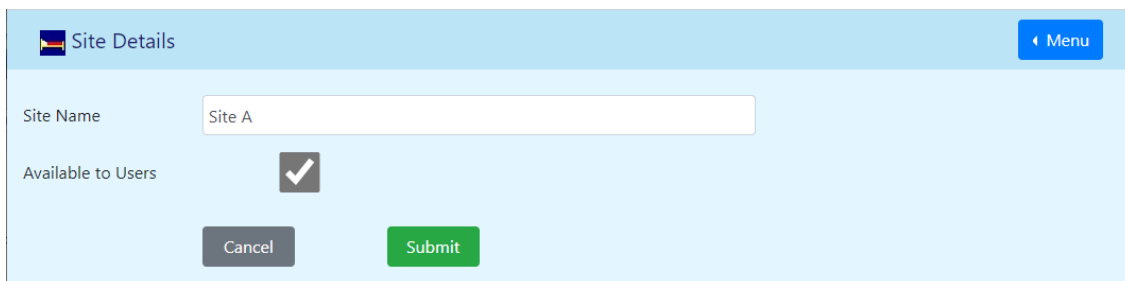
Settings - Sites



Site ID	Site Name
416	Site A
419	Site B

Click on a row to change an existing site's name

Click the New Site button to add a new one.



The Site Name must be unique.

If the 'Available to Users' box is unticked then the site will not appear as one of the filter buttons at the top of the Accommodation List or Accommodation Planner and will not be included in the Site filter list in the Residents Report.

17/12/2020

Settings – Rooms Display Order

The Rooms Display Order is primarily used to determine the order in which accommodation is displayed in the Accommodation List and Accommodation Planner.

Rooms Display Order Menu

Maple 01-2	Maple 02-1	Maple 02-2	Maple 03-1	Maple 03-2	Maple 04-1	Maple 04-2	Maple 05-1	Maple 05-2
Maple 06-1	Maple 06-2	Maple 07-1	Maple 07-2	Maple 07-4	Maple 08-1	Maple 08-2	Maple 08-4	Maple 09-1
Maple 09-2	Maple 09-4	Maple 10-1	Maple 10-2	Maple 10-4	Maple 11-1	Maple 11-2	Maple 11-4	Maple 12-1
Maple 12-4	Maple 12-2							

Cancel Submit

Order in this page is left to right top to bottom.

To re-order drag and drop the relevant buttons to new positions in the list.

When finished click Submit.

Settings – Std Charges List

Std Charges List Menu

ID	Charge Name	Charge Type	Amount	Period	New Amount	From	Available to Users
19	Council Tax	C	25.00	PM			True
27	Double Room x	R	600.00	PM			True
123	Large Flat	R	900.00	PM			True
9	Nightly Rate	R	30.00	PN			True
12	Single - Student	R	350.00	PM			True
16	Single Room	R	500.00	PM			True

New Std Charge

Click a row to edit the Std Charge or click New Std Charge.

Std Charge Details ← Menu

Charge Name

Type

Amount

Period

Rent Change (optional)

New Amount

Change On

This charge available to users to apply to new residents?

The Charge Name must be unique.

The Type must be Rent, Council Tax or Service Charge.

The Amount must be greater than zero.

The Period the charge relates to must be Per Month, Per Night or One-Off.

The optional rent change section is for the New Amount and the date the rent is to Change On. The earliest change date is the 1st of the following month. Changes cannot be backdated. A rent change can be applied only on the first day of a month.

If the 'This charge available to users to apply to new residents?' box is unticked then when a new charge is added to a resident's booking this charge will not be available in the drop down list.

The charge can be deleted only if it has never been used.

Settings – Payment Methods

The screenshot shows the 'Payment Methods List' interface. At the top left is a flag icon and the title 'Payment Methods List'. At the top right is a blue button with a left arrow and the text 'Menu'. Below this is a table with three columns: 'Payment Method ID', 'Payment Method', and 'Available to Users'. The table contains five rows of data. Below the table is a green button labeled 'New Payment Method'.

Payment Method ID	Payment Method	Available to Users
398	Bank Transfer	True
402	Cash	True
405	Invoice	True
411	Payroll	True
414	SO	True

Click on a row to edit an existing payment method.

Click the New Payment Method button to add a new one.

The screenshot shows the 'Payment Method Details' interface. At the top left is a flag icon and the title 'Payment Method Details'. At the top right is a blue button with a left arrow and the text 'Menu'. Below this is a form with a 'Payment Method' label and a text input field containing 'Payroll'. Below the input field is a checkbox labeled 'Available to Users' which is checked with a grey checkmark icon. At the bottom of the form are two buttons: a grey 'Cancel' button and a green 'Submit' button.

The Payment Method must be unique.

If the 'Available to Users' box is unticked then the Payment Method will not be included in the drop down list when adding a new charge or making changes to an existing charge.

Settings – Letters List / Emails

Click on a row to edit an existing letter/email.

Click the New Letter button to add a new one.

Letter ID	Letter Name
1	Test Letter

New Letter

Type in the Letter Text box to create or edit an existing standard letter or email, Copy and paste from the fields list on the right (including the lading and trailing #) to insert live data when a letter or email is generated.

Letter Name: Test Letter

Letter Text:

```
#Date#
Dear #Name#

Your booking details are:
#BookingDetails#

Regards
Jo Bloggs
```

Fields (copy/paste incl #):

- #Date#
- #Name#
- #JobTitle#
- #Department#
- #Organisation#
- #MobileTel#
- #WorkTel#
- #Email1#
- #Email2#
- #RentBalance#
- #EmployeeNo#
- #BookingDetails#

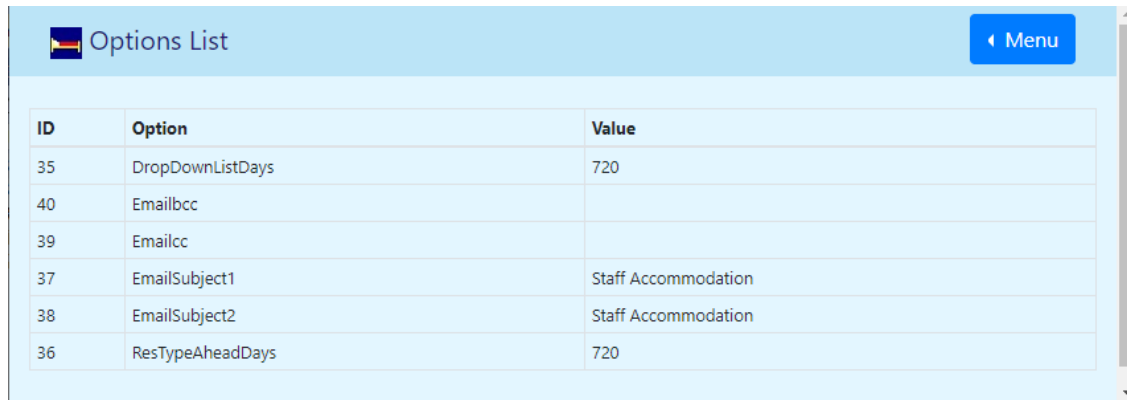
Delete Letter Cancel Submit

The field #BookingDetails# is represented as “Your booking details are: Property Maple 06-1: First night 12-12-2020, Last night: 26-12-2020, Leaving on: 27/12/2020”

The text cannot currently be formatted or images inserted.

Click Submit to save any changes.

Settings – Options



ID	Option	Value
35	DropDownListDays	720
40	Emailbcc	
39	Emailcc	
37	EmailSubject1	Staff Accommodation
38	EmailSubject2	Staff Accommodation
36	ResTypeAheadDays	720

DropDownListDays Default 720 (days). When drop down lists are created from existing data the list is compiled from data from only those residents who left more recently than x days ago. Applies to: Job Title, Department, Organisation, Staff Group, Gender. Thus older data eventually 'drops off' the lists.

Emailbcc (not currently used)

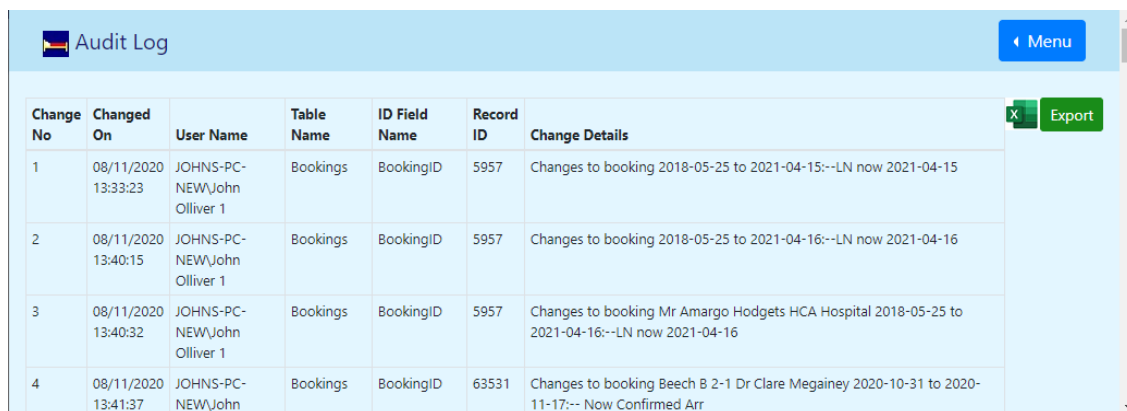
Emailcc (not currently used)

EmailSubject1 Default email subject

EmailSubject2 (not currently used)

ResTypeAheadDays Default 720 (days). When typing a resident name in a search box (Accom List page, Booking Edit page) return only those residents who left more recently than x days ago.

Settings – Audit Log



Change No	Changed On	User Name	Table Name	ID Field Name	Record ID	Change Details
1	08/11/2020 13:33:23	JOHNS-PC-NEW\John Olliver 1	Bookings	BookingID	5957	Changes to booking 2018-05-25 to 2021-04-15:--LN now 2021-04-15
2	08/11/2020 13:40:15	JOHNS-PC-NEW\John Olliver 1	Bookings	BookingID	5957	Changes to booking 2018-05-25 to 2021-04-16:--LN now 2021-04-16
3	08/11/2020 13:40:32	JOHNS-PC-NEW\John Olliver 1	Bookings	BookingID	5957	Changes to booking Mr Amargo Hodgets HCA Hospital 2018-05-25 to 2021-04-16:--LN now 2021-04-16
4	08/11/2020 13:41:37	JOHNS-PC-NEW\John	Bookings	BookingID	63531	Changes to booking Beech B 2-1 Dr Clare Megainey 2020-10-31 to 2020-11-17:-- Now Confirmed Arr

A log of all main changes made to the data in the previous 90 days.

17/12/2020

Cannot be edited.

Can be exported to Excel.

Booking Details

All new bookings or changes to existing bookings are made on this page.

The screenshot shows a web browser window with the URL localhost:53574/BookingEdit?BookingID="63640". The page title is "Booking Details for Dr Tawnya Shellum in Holly C 1-1". There is a "Menu" button in the top right. Below the title bar, there is a "Send Email/Letter" button. The main content area has two tabs: "Booking Details" (selected) and "Change Form". The form contains the following fields and controls:

- Booking Ref: 63640
- Property: Holly C 1-1
- Resident: Dr Tawnya Shellum Hospital (with a "Res Details" button)
- First Night: 14/12/2020 (with a calendar icon) and a "Confirmed Arrived" checkbox.
- Last Night: 14/12/2020 (with a calendar icon) and a "Confirmed Left" checkbox.
- Charge: Double Room £600.00pm by Payroll. Not yet charged. (with an "Edit Charge" button)
- Charge: Add Charge (with an "Add Charge" button)
- Booking Note: (empty text area)
- Alert Date: dd/mm/yyyy (with a calendar icon) and an "Alert Active" checkbox.
- Tenancy: (empty text area)
- Long Notes: (empty text area)

At the bottom of the form, there are four buttons: "Delete Booking", "Move Booking", "Cancel", and "Submit".

The Booking Ref and Property are filled automatically.

■ New Booking

Where the booking is new an existing or past resident can be searched for by typing into the Resident 'Type to Search' box (minimum 3 characters) and selecting from the drop down list. Alternatively clicking on the 'Add New Res' button will enable a new resident to be created.

17/12/2020

Resident	Add New or Search Existing		bra	<input type="button" value="Add new Res"/>
First Night	dd/mm/yyyy	<input type="checkbox"/>	Confirmed Arr	Reese Brawn (Physio)#5339
Last Night	dd/mm/yyyy	<input type="checkbox"/>	Confirmed Lef	Brandtr Whelan#5979
				Mr Blanca Branwhite (Staff Nurse)#6162

■ Date Input

First Night	dd/mm/yyyy	<input type="checkbox"/>	Confirmed Arrived
Last Night	dd/mm/yyyy	<input type="checkbox"/>	Confirmed Left

First Night and Last Night are mandatory fields.

The First Night can be changed until the Confirmed Arrived box has been ticked. The Confirmed Arrived box is disabled until the day of the First Night date. Once the Confirmed Arrived box has been ticked and the form submitted the Confirmed Arrived box cannot be unticked and the First Night

The Last Night can be changed until the Confirmed Left box has been ticked. The Confirmed Left box is disabled until the day of the Last Night date. Once the Confirmed Left box has been ticked and the form submitted the Confirmed Arrived box cannot be unticked.

The minimum stay is one night.

A booking can be deleted as long as the Confirmed Arrived box has not been ticked. When a booking is deleted all associated standard charges set up for the booking are deleted at the same time.

The arrival departure dates will always be checked to make sure they do not clash with another current or booked resident for that room.

The resident can also be moved to a different room later - even before arrival, see Moving a resident.

■ Charges

Details of any charges already applied to the booking will be summarised here (and can be edited by clicking on the 'Edit Charge' button).

One or more standard charges can be applied to the booking by clicking on the 'Add Charge' button.

Charge	Double Room £600.00pm by Payroll. Not yet charged.	<input type="button" value="Edit Charge"/>
Charge	<input type="button" value="Add Charge"/>	

Charge Details: Dr Tawnya Shellum in Holly C 1-1 14-12-2020 to 14-12-2020 Menu

Charge Name

PaymentMethod

Status

Optional override of default charging dates:

From First Night (default) or from

Until Last Night (default) or until

Select an appropriate Charge Name and Payment Method from the dropdown lists. The Charge Names and details (amount, type and period) are managed in the Settings page (Resmanager_Admis users only) as are the Payment Methods.

The default charging period is First Night until Last Night. If necessary one or both of these dates can be overridden (but not to a date outside the First Night to Last Night period). Once a charge has been made for the first time on the booking the override 'From First Night' date cannot be changed.

A charge can be deleted only if it has not yet been charged. If the charge has already been made then the 'Until Last Night' date will have to be overridden for that charge (and a credit applied to the resident's account).

No charges are calculated and added to the account until the Confirmed Arrived box has been ticked.

In the case of monthly charges part months are calculated using a daily rate (multiplying the monthly rate by 12 and dividing by 365).

If the booking dates or override dates are subsequently changed any charges already made will automatically be adjusted if necessary.

■ Alerts

An Alert can be set up for a booking for any date or reason. The reason for the Alert can be noted in the Booking Note as this is displayed on the Alerts Page. Active alerts are flagged on

the Resmanager Dashboard page as



once the Alert Date has been reached and the Alert Active box is ticked.

Booking Note

Alert Date Alert Active

Tenancy

Long Notes

■ Move Booking

A booking can be moved to another property before or during the period of the booking (as long as the Confirmed Left box has not been ticked) by clicking on the Move Booking button.

Move Booking for Dr Tawnya Shellum in Holly C 1-1

Property

Resident

First Night

Last Night

Select Move Date

Select Property

Select a Move Date and a Property to move to. Depending on the move date the booking will be split or moved in its entirety.

Note re charges

If the booking is moved in its entirety all existing charges will be cancelled and new charges will need to be applied.

If the booking is split the existing charges for the 'old' booking will be stopped so new charges for the new property will need to be set up in a new Booking Details page (which is redirected to after the Submit button has been clicked).

■ Change Form

Booking Details

Booking Details

This form details all the information for a booking and can be printed. (The form cannot currently be emailed as it is displayed however the data can be selected, copied and pasted into the body of an email.)

Change Form	
Resident:	Dr Cross Weedenburg
Job Title:	Locum
Department:	A&E
Organisation:	
Employee No:	
Work Tel:	
Mobile:	
Email:	
Booking Ref:	6155
RoomCode:	Beech B 2-4
RoomType:	Single Room
First Night:	22-10-2018
Last Night:	24-12-2020
Charges:	
Nightly Rate £30.00 pn Bank Transfer	
First month: £300.00 (22-10-2018 to 31-10-2018 @ £30.00 pn)	
Last month: £720.00 (01-12-2020 to 24-12-2020 @ £30.00 pn)	
Form created on 14-12-2020 16:29	

Resident Details

These details can be used for multiple bookings i.e. re-used and can be changed as the resident's details change.

For Job Title, Department, Organisation, Staff Group and Gender there are dropdown lists automatically created from other recent residents. Either select from the dropdown list or type directly into the box.

The DoB field is intended to help easily differentiate between residents with similar names and does not have to be full date or even a date at all, it can be some other means of ID or differentiating.

Resident Details for Dr Cross Weedenburg Menu

Send Email/Letter

Resident Details Bookings Account

Resident Ref: 6155

Title: Dr

Forenames: Cross

Surname: **Weedenburg**

Job Title: Locum

Department: A&E

Organisation: St Marys

Staff Group: Medical

Mobile: 0123456789 Work Tel: 0123456789

Email 1: weed1@gmail.com Email 2: weed1@hotmail.com

Gender: Male DoB(ID): 16 Dec

Employee No: 1478963258 Vehicle: Red Volvo

Report Notes: Some notes here

Detailed Notes: Some more detailed notes here

Cancel Submit

■ Bookings

Lists all historic, current and future bookings for the resident. Click on a booking to go to the Booking Details page.

Resident Details **Bookings** Account

Booking Ref	Room	First Night	Last Night
6155	Beech B 2-4	22-10-2018	24-12-2020

■ Account

Lists all transactions for all bookings for the resident in date order.

Resident Details for Dr Cross Weedenburg Menu

Send Email/Letter

Resident Details Bookings **Account**

Add New Transaction Print X Export

Account for Dr Cross Weedenburg					
Date	Description	Type	Method	Amount	Balance
22-10-2018	Weekly Charge 22.71 PN Beech B 2-4 22-10-18 28-10-18 #6155	Rent	Bank Transfer	158.97	158.97
22-10-2018	Manual credit Beech B 2-4 #6155	Rent	Bank Transfer	-636.00	-477.03
29-10-2018	Weekly Charge 22.71 PN Beech B 2-4 29-10-18 04-11-18 #6155	Rent	Bank Transfer	158.97	-318.06
05-11-2018	Weekly Charge 22.71 PN Beech B 2-4 05-11-18 11-11-18 #6155	Rent	Bank Transfer	158.97	-159.09
23-09-2020	Nightly Rate 9 £30.00 PN Beech B 2-4 12-11-18 19-11-18 #6155	Rent	Bank Transfer	240.00	80.91
23-09-2020	Nightly Rate 9 £30.00 PN Beech B 2-4 20-11-18 30-11-18 #6155	Rent	Bank Transfer	330.00	410.91
23-09-2020	Nightly Rate 9 £30.00 PN Beech B 2-4 01-12-18 31-12-18 #6155	Rent	Bank Transfer	930.00	1,340.91
Charges Balance				20,780.91	Deposit Balance 00.00

Add New Transaction Print X Export

The Account can be exported to Excel or Printed.

Click on Add New Transaction to post a Debit, Credit, Receipt, Refund or Deposit to the Account.

localhost:53574/TransEdit?Resid... x +

localhost:53574/TransEdit?ResidentID=%276155%27

Add a Transaction Menu

Date: 14/12/2020

Amount: 0

Transaction Type: Receipt

Payment Method: Bank Transfer

Description: Rent receipt

Cancel Submit

Enter the Transaction Date (up to 14 days previous), the Amount (as a positive amount regardless of debit or credit), The Transaction Type, Payment Method and Description.

The Transaction Type can be selected from the dropdown list:

Add a Transaction

Date: 14/12/2020

Amount: 0

Transaction Type: Receipt

Payment Method: Rent

Description: Rent Credit

Submit

Accommodation Details

This is the only page where existing Accommodation Details or a new property created.

Navigate to this page by click on a blue Property button in the left hand column of the Accommodation List or Accommodation Planner.

localhost:53574/Accomlist

localhost:53574/Accomlist

Accommodation List - All Menu

Beech C 3-1	New	Neddy Sisson 10-09-20 14-01-21	
Beech C 3-2	New	Dr Hurley Gladdifh 20-01-18 05-04-21	Reynolds Hollidge 11-04-21 19-04-21
Beech C 3-3	New	Dr Ainslie Mustoo 16-10-16 05-04-21	Clementia Jumel 23-04-21 02-05-21
Beech C 3-4	New	Drucie Fronks 05-11-18 08-06-21	Randi Abela 13-06-21 15-07-21
Beech C 4-1	New	Dr Conrad Douglass 15-02-18 04-02-21	Marianna Andrieu 09-02-21 26-02-21
Beech C 4-2	New	Dr Clarabelle Brine 07-05-17 12-02-21	Miss Wallis Gologley 03-03-21 23-04-21
Beech C 4-3	New	Dr Hurley Gladdifh 10-09-20 19-01-21	

Accommodation Details for Beech C 3-1

Accom Details Bookings Closures

Accom Code: Beech C 3-1

Type: Single Room

Building: Beech

Report Note:

Long Notes:

Cancel Submit

The Accom Code is the shorthand identifier for the property used throughout the application.

Select property Type from the dropdown list or type a new one, select Building from the list, optionally enter notes.

■ Bookings

All the historic, current and future bookings for the property. Click on a booking row to go to the Booking Details page.

Accommodation Details for Beech C 3-1 Menu

Accom Details Bookings Closures

Add New Booking

Booking Ref	Name	First Night	Last Night
63542	Neddy Sisson	10-09-2020	14-01-2021
6142	Dr Fiona Clinton	12-10-2018	23-10-2018
6136	Dr Dorice Undrill	08-10-2018	09-10-2018
6040	Mr Malinde Huey	27-08-2018	18-09-2018
5937	Randi Abela	02-02-2018	03-02-2018
5855	Dr Franciskus Fayers	25-09-2017	28-09-2017

■ Closures

All the historic, current and future closures for the property.

Closure Ref	Reason	First Night	Last Night
1114	Redecoration	14-02-2022	21-02-2022

Add New Closure button or click on a closure row.

Closure Details Menu

Closure Ref: (New)

Accom: Beech C 3-1

First Night: 14/02/2022

Last Night: 21/02/2022

Reason: Redecoration

Enter the First Night and Last Night and Reason

The details may be changed subsequently if necessary or the closure deleted. Multiple closures may be entered.

The application will automatically prevent a closure period from clashing with a booking. Similarly a booking date cannot be changed if the new dates would clash with a closure period.

Closures are displayed like bookings (but in grey) in the Accommodation List and Accommodation Planner.

How to:

■ Increase or change standard charge (e.g. annual increase)

Go to Settings – Standard Charges.

■ Find vacant accommodation

Scan the Accommodation List to find an empty room (no blue 'current' booking') or in the Accommodation Planner or use the Vacant Search to find a room which is empty on a specified date or continuously empty between two dates

To search for accommodation vacant for one night only enter the same date in both boxes. (By default the boxes contain today's date so clicking on the Search button without changing any dates will find all rooms vacant tonight.

The vacant list will show a list of rooms vacant for the period together with the current and/or booked residents for those rooms if there are any. This type of search takes into account projected leaving dates for current residents leaving and projected arrival dates for booked residents.

■ **Delete a resident**

Unconfirmed bookings can be deleted but not (currently) residents.

■ **Confirm arrivals and departures**

Go to the Booking Details – click on the Confirmed Arrived or Confirmed Left box

■ **Alphabetical list of current residents**

Menu - Residents List – Current button.

■ **Alphabetical room list showing current and booked residents**

Menu - Accommodation List.

■ **Rent report for last month**

Menu – Rent Report. Select Month Ending date.

■ **Add a new unit of accommodation**

Menu – Settings – Add New Accommodation (Resmanager_Admins only)

■ **Delete accommodation**

Not currently available.

■ **Change a property type**

Click on a blue Property button in the left hand column of the Accommodation List or Accommodation Planner. In the Accommodation Details page change the Type.

■ **Export data**

Click on Excel button if displayed on the page.



Alternatively select text on the page and copy and paste into (e.g.) Microsoft Word

■ **Booked resident cancels or doesn't arrive**

Cancel the booking in the Booking Details page

■ **Resident moves room**

Click on the Move button in the Booking Details page

■ Resident arrives

In the Booking Details page make sure the first night date is correct and then tick the Confirmed Arrived check box.

■ Resident leaves

In the Booking Details page makes sure the last night date is correct and then tick the Confirm Left check box.

■ Convert flat to rooms or rooms to flat

A flat may sometimes be let as separate bedrooms and sometimes as a self contained family flat.

Example1

Three rooms Acorn 1, Acorn 2, Acorn 3 to be let as self contained flat.

- Close all three rooms in Accommodation Details – Closures in each case.
- Add one new property with Property Code 'Acorn Flat 1' e.g. as Type 'Flat'.
- via Menu – Settings – Add New Accommodation (Note: Resmanager_Admins only).

To reverse this procedure set the flat as closed in Accommodation Details – Closures and edit the Closures for the original three rooms.

Example2

One three bed flat 'Acorn Flat 1' to be let as three single rooms.

- Close the flat in Accommodation Details – Closures.
- Add three new properties 'Acorn 1-1', 'Acorn 1-2', 'Acorn 1-3' as Type 'Single Room'.
- via Menu – Settings – Add New Accommodation (Note: Resmanager_Admins only).

To reverse this procedure close the three rooms and edit the closure for the flat in Accommodation Details.

(END HELP)