Add or Edit Letters

The MyPMS Letters function allows you to create and customize Letters that you email and/or print for guests, use in Incident Reports, or request to have signed as part of eSIgn requests. Customized Letters are available in the Letters Tab of every booking and used for the Default Letters as per the service (such as Housekeeping App for an Incident Reports or eSIgn as part of Self Check-in). See Default Letters
A "Letter" is any document that you create in SETUP | PARAMETERS | LETTERS. For example, a Registration Card, Incident Report for Housekeeping and/or Maintenance, Confirmation Letter, Cancellation Letter, Receipt, Thank you for staying, etc. Basically anything you would like to create to send to guests or store with a Booking(s).

The Letter can customized with simple text and images or designed with tables in the HTML Editor. For instructions and examples of Letters, see Customize Letters

To display specific guest and booking information we use Merge Fields. Merge fields automatically insert specific data for the booking i.e. Guest name or Deposit made. We offer a wide variety of Merge fields. To see a complete list of Merge Fields,see Merge Fields - Individual Letters To see examples of how Merge Fields are used in Letters, see Merge Field Examples

Remember, any of these Letters can be *automatically* sent to guests before or after arrival by using Auto Letters
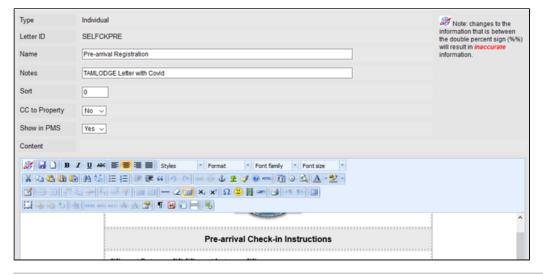
Letters Setup

Add A Custom Letter : To add a new Letter, follow these steps

Go to SETUP | PARAMETERS | LETTERS.

- To create a new Letter, click **ADD** at the bottom right of the list to create a new Letter
- Choose from the Letter Type drop down menu what type of Letter template you are crafting. For Letters relating to Bookings, it will be the 'Individual' option. If you chose Letter Type: SMS, Group, Guest, Incident Report, or Kiosk, those Letters are stored in their own section and are used specifically for those types of activities.
  - **Booking Letters:** Letters for Individual Bookings and POS Receipt ONLY. See Individual Letters and POS Receipt.
  - **Group Booking Letters:** Letters for Group Bookings ONLY. See Group Letters
  - **Guest Letters:** Letters used for special promotions like birthdays, etc.
  - **SMS:** Use to create SMS Messages.
  - **Incident Report:** Use to create an Incident Report with the Housekeeping App
  - **Kiosk:** Letters used for Confirmation, Welcome and Inactive during Kiosk Self Check-in
  - **Agent:** Use for Letters sent to Agents
  - **Owner:** Use for Letters sent to Owners.

- The Letter Editor will open to create a Letter. Save your changes and the Letter will appear in the Letters list. You can now use this letter in Booking under Letters and in the Auto Letters function.
- To verify your changes: Select any booking, go to the Letters Tab and choose the revised letter. If necessary, make additional edits by repeating the steps above.

Letter Features

- **Name:** The text entered here will appear as the Subject Line of the Email if the Letter being created is sent via email.
- **Notes:** These are internal notes for you and will not be displayed to guests.
- **Sort:** The sort order entered here will display in the drop-down list in the Letters Tab of the booking.
- **CC to Property:** Select "Yes" if you want this letter automatically cc'd to the main property email when sent to a guest.
- **Show in PMS:** Select "Yes" if you want the letter to viewable and selected in the drop-down list of the Letters Tab in the Booking. There may be Letters you use for other functions like Agents, Esign, etc. that you do not need displayed.

Edit A Custom Letter

To edit any letter in the MyPMS system, go to **Setup | Parameters | Letters**.

Please note: Letter types cannot be changed after they are created. Therefore, if you want to use an existing letter and it is not set to the Letter Type of your choice, then you must create a new letter.

Follow these steps:

1. **Open Letter:** choose the Letter you want to edit by clicking on the Letter I.D. or selecting it and choosing 'Edit'. The Letter will open in an Editor which you can use to customize your letter.
2. **Editor Toolbar:** The toolbar at the top has many features you can use to customize your Letter including adding images, text formatting and other standard features. It also includes a full set of Merge fields used to insert booking, financial and guest information from your records and transactions to appear automatically in the Letter.
   - **Merge Fields**
     - To see the available list of merge fields, click on the the BookingCenter "globe" icon in the top left corner of the editor.
     - To insert the value of the merge field you want, place your cursor at the location in Letter you want it to appear. Then, click on the desired value from the merge fields list.
     - To change or edit your Merge fields in the Letter, highlight the field and click on the BookingCenter "globe" icon in the top-left of the editor. Choose the new field from the drop down menu and it will replace the highlighted field
     - To see a list of Merge Fields, see Merge Fields - Individual Letters and Merge Fields - Group Letters
3. Once you have finished editing your Letter, click **Update** to save your changes.