

Self Setup | Customize MyPMS

Now that you have setup the Room Types, Rates, Rooms and Taxes, you can further customize MyPMS to fit your property.

The information you enter will help track Guest history, provide valuable marketing information and enhance your reports. To get the most out of our customization features, please enter the information as completely as possible. For example, Deposit and Cancellation policies can be automatically printed on your Confirmation Letters; Or, the Bookings Reports by "Source" will be more accurate with detailed sources added.

Although customizing all of these functions is not necessary for your MyPMS to function, we recommend that you customize at least the three areas outlined below. These include basic information such as, guarantee requirements, deposit and cancellation policies, payment receipts, guest types, marketing messages, booking sources, images and letters. Further customization can be made at anytime in the future as needed.

In MyPMS, customization is done in the [Setup](#) area. To access [Setup](#), click the [Setup](#) link in the top, right hand corner of MyPMS.

To get started watch the short Introduction video and follow the step-by-step instructions below.

Self Setup | MyPMS Complete Setup

- [Self Setup | MyPMS Overview](#)
- [Self Setup | Manage Rates](#)
- [Self Setup | Customize MyPMS](#)
- [Self Setup | Update Availability](#)
- [Self Setup | Start MyPMS](#)

Watch this short introduction to Customizing MyPMS, then follow the step-by-step instructions below.

Complete the following sections to further customize your property. Although some are optional, they can be useful on Reports and for Guest Marketing. We have provided default information as part of your set up, but you can easily add and edit. For example, Sources on guest bookings can be used to track occupancy, revenue, etc. by Source. Entering relevant terms to your property will give you more valuable data so please customize your system as much as possible.

Start with the following three areas in Setup. You will see default entries in many of the sections which can be used, made inactive or deleted. Further customization can be made at anytime in the future as needed. Please enter the information in these sections as completely as possible.

Settings

- [Tax Configuration](#)
- [Marketing And Policies](#)

Parameters

- [Sources](#)
- [Guest Types](#)
- [Receipt Types](#)
- [Confirmation Letters](#)

Features and Images

- [Images](#)
- [Room Type Images](#)
- [Amenities](#)

If you need to add Additional Users , please see [Add Users](#) Each user is given login credentials and assigned a "Role" which grants access to certain Reports, Night Audit and the Setup Area.

To see further areas of customization in MyPMS [Customize MyPMS](#)

If you need help or have a question, please submit a ticket at the [Online Support Center](#)
To login for the first time, use your email address on file for the User ID AND Password.
