

Printing_Emailing Custom Letters Using Data Merge

BookingCenter gives you the option of creating your own customized confirmation letters and takes advantage of the Merge capabilities of your word processing software to automatically personalize each letter for each guest. These capabilities require setting up Personnel. (See "Setting up Personnel" on page xxxviii) . We recommend using Microsoft Word (or AppleWorks or WordPerfect) and choosing the Wizard for Setting up a Merge Letter. This will create the basic Form Letter that is the basis for using your Merge Letters.

Note BookingCenter provides example letters for you use in the folder called /templates/ found in the BookingCenter folder on your computer. There are three files here:

Booking_Merge_Sample.doc - a MS Word file that is used as a confirmation letter to a single booking.

Registration_Merge_Sample.doc - a MS Word file that is used as a registration letter for when a Guest checks in.

Group_Merge_Sample.doc - a MS Word file that is used as a confirmation letter to a group booking (this one contains up to 5 individual booking details on it - you can use up to 20).

Sale Merge.doc - a MS Word file that is used to create custom invoices or sales account letters. (this one contains up to 5 individual items and payment details- you can use up to 20).

Either use these template files as the basis of your own letters, or use them as a guide for crafting your own.

To use your own Letters, you have to setup at least one Personnel to let BookingCenter know where to export the 'data source', as specified in the Personnel section. (See "Setting up Personnel" on page xxxviii) . If you will be using Personnel to track all users, then each Personnel must have a 'set merge path' chosen on EACH COMPUTER they will be working upon. If you are NOT using Personnel from within BookingCenter (ie, you are NOT tracking individual users by logging in and applying Person codes to each booking and receipt) then you still must set the Merge Path for the ID: M (Master) and ID: Web (Website) to use the folder where you place the Letters you are using.

Note For example, if you are simply going to use the example files provided by BookingCenter, you would set the Merge Path for the ID: M (Master) and ID: Web (Website) to use the folder C:/BookingCenter/templates.

By setting the path from BookingCenter to the folder where the Letters are stored, you are notifying BookingCenter where to place the data sources when printing to File.

Note There are four different data sources created by BookingCenter:

1. "bookmerge.txt" is created when printing to File from a Booking
2. "groupmerge.txt" is created when printing to File from a Group Booking.
3. "guestmerge.txt" is created when printing to File from Guest Detail or Guest Marketing.
4. "salemerge.txt" is created when printing to File from a Sales / Account.

BookingCenter auto-generates the data source file for each Booking, Group booking, or Guest Detail. Each PERSON ID attached to a booking will dictate WHERE the data source will go - this allows the property to have different letters from different Personnel/Departments. For example, the Reservations department might have one confirmation letter, while an Accounting Department might have another. If many users with different PERSON IDs want to share the same letter, simply point each person's "Set Merge Path" to the same folder/directory on the computer.

Each time you want to print a merge Letter, you will choose FILE as the destination. This tells BookingCenter to write the new data sources and automatically open the Letter chosen from the Letters area of BookingCenter (See "Setting up Letters" on page liii) . Basically, all the merge fields of the data source will come from the Booking Details/group Booking/Guest Detail screen of the last FILE export, each following Print to File over-writing the one prior. An example of the outputted file of the bookmerge.txt file has the header name above and the record below:

Header Row: Title,Firstname,Surname,Company,Address,City,State,Postcode,Country,Phone,Fax,BookingID,Booking Date,BookingStartDate,BookingStartTime,BookingEndDate,BookingEndTime,BookingDuration,Adults,Children,Infants,Room,RoomType,ConfirmBy,PayBy,AccomCost,ExtrasCost,TotalCost,Tax,ServChg,Discount,Total,Receipts,Refunds,CancelFee,Balance,Rate,Agent,AccomAddress,AccomCity,AccomState,AccomPostcode,AccomPhone,AccomFax,AccomContact,Person

Specific Data:
"","Jeff","Tweddale","","14945 Coleman Valley Rd","Occidental","CA","95465","USA","707-874-3996","","894-3W","November 7th 2002","Thu November 7th 2002","2:00PM","Sat November 9th 2002","10:00AM",2,1,0,0,"101","DormBeds","November7th2002","November7th 2002",126.50,49.88,176.38,13.38,5.50,0.00,176.38,0.00,0.00,0.00,176.38,"Dorm Beds","BookingCenter.com Members Area","","","","","Network Bookings"

You can print the Letter to your printer and <optionally> save the new letter to a directory where you save all your correspondence.

Tip For example, if I had just made a booking for Ernesto Marcos numbered Booking ID 123W, and wanted to mail/fax him a confirmation letter, I would choose the specific Booking Detail

123W and choose Print | File. Then, I would open my Confirmation Letter I created as a Merge Form (called Auto Confirmation merge.doc here) and voila! I would see all of Mr Marcos' details in the letter. I would print a copy. I would NOT save changes to the Confirmation Letter unless I wanted to change my template. I might decide to save a copy of the letter, but I can create a new one at any time by following these steps once again, so I likely would not.

5. Once the data is merged with your form letter, print the letter to your printer.

6. Optionally save the new letter to a directory where you may save your guest correspondence.

Tip There are dozens of sample merge letters BookingCenter makes available for use on our website. See <http://www.bookingcenter.com/help/letters.html> to download and edit one for your use.