

Customize Letters

The MyPMS Letters function allows you to create and customize Letters that you email, SMS/text, and/or print for guests.

A "Letter" is any document that you create in **SETUP | PARAMETERS | LETTERS**. For example, a Registration Card, Confirmation Letter, Cancellation Letter, Receipt, Thank you for staying, etc. Basically anything you would like to send to guests. To learn more about creating Letters, see [Letters](#)

The Letter can be customized with simple text and images or designed with tables in the HTML Editor. 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. To see examples of how Merge Fields are used in Letters, see [Merge Field Examples](#)

We offer a wide variety of Merge fields for both Group and Individual Letters. To see the completed list of Merge Fields, see [Merge Fields - Individual Letters](#) and [Merge Fields - Group Letters](#)

Remember, any of these Letters can be *automatically* sent to guests before or after arrival by using [Auto Letters](#) or [Self Check-in](#).

See how we use the merge fields in these sample Letters. Feel free to copy and paste any of the Letter contents and edit to your property.

- [Confirmation Letter](#)
- [Group Confirmation Letter](#)
- [Registration Letter Individual](#)
- [Group Booking Engine Letter Sample](#)
- [Group Booking Engine Letter HTML](#)

- [Default Letters](#)
- [eSign - Digital Document Signing](#)
 - [eSign Process](#)
 - [eSign - Front Desk Signatures](#)
 - [Create Default eSign Letter](#)
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 - [Group Booking Engine Letter HTML](#)
- [Auto Booking Confirmation Letters](#)

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

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 "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 "globe" icon in the top-left of the editor. Choose the new field from the dropdown 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.

In this section

Letters Setup

Note:

- If you insert a merge field that involves payment in the Folio, the field will appear blank if there aren't any transactions in the Folio yet.
- A common request from customers is for Charges, Rents, and Payments to be seen on a confirmation. If your business policy is to place the RENT charges on the folio at time of booking, then '**Display All Folio Items**' will be the right choice. **However, if you pre-book some Charges, such as a spa or transportation charge, but let Night Audit post the RENT charges (most common), and you wish for a Guest to get a clear indication of what *has been* charged and *will be* charged, then use the '**Display All Folio Items**' for the Charges posted and, in another section of your Letter, the '**Daily Rate Grid**' so that 'current' charges on a folio are on one portion of the letter, and the 'projected' Rate Grid is on another portion of the letter. This allows the Guest to see what will be charged, assuming dates and rates don't change.**
- If you wish to have Guests upload document or images, keep in mind that each Letter has a maximum of 3 'documents' that can be uploaded and 5 'images' per Letter.