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How to Set Up and Send Confirmation and Form Letters

SUMMARY

Confirmation letters and Form letters, such as Thank You letters, integrate with the reservation and customer file utilizing Microsoft Word 2000/XP. The documents are selected while on the reservation or the customer file and the pre-selected key fields will automatically fill onto the document. Letter templates are already available with the program. The user can customize the existing letter templates or easily create new ones.

HOW TO SEND A CONFIRMATION LETTER OR A FORM LETTER

1. Make sure the reservation or customer file for the Confirmation or Form Letter is on the screen. Click on **Print** and click on **Confirmation Letter** or **Form Letter**.
2. Highlight **Confirmation Letter** or **Form Letter** file and click on **Proceed**. The program comes with Confirmation and Form Letters templates. To edit these letter templates or create new ones please refer to "How to Edit Confirmation and Form Letter Templates" and/or "How to Create Confirmation and Form Letter Templates".
3. Select whether to send the letter to the **Screen**, **Printer**, **Fax** or **E-mail**. The program will automatically fill the pre-selected key fields ("bookmarks") on the integrated MS Word template from the reservation or customer file, and then send the document.

HOW TO EDIT CONFIRMATION AND FORM LETTER TEMPLATES

1. Click on **System** on the upper menu or side icon toolbar and **Form Letter Maintenance via MS Word**.
2. A **Form Letter Maintenance** window will appear. Under **Form Letter For:** there are three categories: **Customer**, **Reservation** and **Confirmation**. The Customer and Reservation categories are form letters such as Thank You notes. The following procedures for editing letter templates, applies to all three categories.
3. Once a category is selected, a list of available letter templates will appear on the right hand side of the window. The program comes with various letter templates
4. To **Edit** a letter template, highlight the letter template and click on **Edit**. The MS Word letter template file will open and become available on the task bar at the bottom of the screen. At this point the user is working with two programs that are integrating, LMS Gold for Windows and MS Word.
5. Click on **Legend** on the **Form Letter Maintenance** window. A **Legend** window will open, which lists all the available selections for the letter template. This Legend window can be moved around the screen for easy viewing of the text underneath.

6. Click on the letter template file that is available on the task bar to open it for editing. There will be several gray boxes ("bookmarks") in key fields throughout the letter template, such as the date, passenger or bill to name. To find out what information will be taken from the reservation or the customer file and placed in the bookmark fields, double click on the gray box and MS Word will open a **Text Form Field Options** window. At the lower bottom portion of this window there is a field called **Bookmark,** which indicates what information will be placed in the gray box on the letter template. For example, double click on the gray box next to the word "Dear" on the letter template. The Bookmark field would contain a message like "Reserve_Passengers". This indicates that the passenger's/customer's name will be taken from the reservation or customer file and it will appear on the letter template. *Make sure to **Close** the **Text Form Field Options** window before proceeding.*

7. To change the information in a selected gray box, place the cursor on the gray box on the letter template, then highlight a selection from the **Legend** window and click on **Select**.

<div align="center">and/or</div>

To add text and bookmarks type the additional text and then place the cursor where the bookmark is to be added on the letter template and highlight a selection from the **Legend** window and click on **Select**.

8. Once all the changes have been made to the letter template, click on **Exit** on the **Legend** window and save the letter template using the MS Word **Save** or **Save As** command. The changes will be saved in LMS Gold for Windows under the appropriate category.

9. To edit another letter template, the user must first close the **Form Letter Maintenance via MS Word** window to close the previous session. Follow steps 1-8 to edit the next letter template.

HOW TO CREATE CONFIRMATION AND FORM LETTER TEMPLATES

1. Click on **System** on the upper menu or side icon toolbar and **Form Letter Maintenance via MS Word**.

2. A **Form Letter Maintenance** window will appear. Under **Form Letter For:** there are three categories: **Customer**, **Reservation** and **Confirmation**. The Customer and Reservation categories are form letters such as Thank You notes. The following procedures for creating letter templates, applies to all three categories.

3. Once a category is selected a list of available letter templates will appear on the right hand side of the window. The program comes with various letter templates.

4. To **Create** a new letter template type the name of the new letter template in the **Form Letter Name** field. Click on **Add**. A blank MS Word letter template file will open and become available on the task bar at the bottom of the screen. At this point the user is working with two programs that are integrating, LMS Gold for Windows and MS Word.

5. Click on **Legend** on the **Form Letter Maintenance** window. A **Legend** window will open and list all the available selections for the letter template. This Legend window can be moved around the screen for easy viewing of the text underneath.

6. Click on the blank letter template file that is available on the task bar to open it for adding text. Wherever the user would like to have information taken from the reservation or customer file and placed in the letter template, a bookmark will need to be added. To add a bookmark, place the cursor where the bookmark is to be added on the letter template, highlight a selection from the **Legend** window and click on **Select**. A gray box will now appear on the letter template. To verify what information is in the bookmark once it has been created, double click on the gray box on the letter template and MS Word will open a **Text Form Field Options** window. At the lower bottom portion of this window there is a field called **Bookmark**, which indicates what information will be placed in the gray box on the letter template. The Bookmark

field will contain a message like "Reserve_Passengers". This indicates that the passenger's/customer's name will be taken from the reservation or customer file and it will appear on the letter template. *Make sure to **Close** the **Text Form Field Options** window before proceeding.*

7. Once the letter template is complete, click on **Exit** on the **Legend** window and save the letter template using the MS Word **Save** command. The changes will be saved in LMS Gold for Windows under the appropriate category.

8. To create another letter template, the user must first close the **Form Letter Maintenance via MS Word** window to close the previous session. Follow steps 1-7 to create another letter template.