

Email/SMS Integration in Maestro Quick Reference Guide

Date: November 15

Introduction

In Maestro version 5.1 and higher, users can communicate with guests, staff and contractors directly from the Maestro PMS software. This communication is facilitated by emails and SMS (commonly known as Text Messages).

It is assumed that the reader:

- Is familiar with the Maestro User Interface
- Is familiar with Maestro Trace Messages
- Is familiar with Soft Check In
- Has completed the setup in Maestro to send email messages
 - To configure Maestro to send emails, please refer to the Email Integration Setup QRG.
- Has completed the setup in Maestro to send SMS messages
 - To configure Maestro to send SMS messages, please refer to the SMS Integration Setup QRG.

Global Email /SMS Traces Setup

The setup for clerks to receive email and SMS messages can be found in Global Maintenance.

Security | Clerk Code Maintenance | Select clerk then go to Window | Extra Information

🔷 Clerk Extra Information Mainter	nance [nwind] - Northwind H	
<u>File Record Window H</u> elp		
2 3 88 1/2 1 20 1/2 1/2 1/2 1/2 1/2 1/2 1/2 1/2 1/2 1/2		
edit		
Clerk Code	NWIND	
Title	Northwind	
Phone Number	905-940-1924	
Phone Extension		
Fax Number		
Email Address	maestro@maestropms.com	
Cell#	905-940-1925	
Disp Trace Summ		
Email Traces	Y	

To receive trace messages and staff alerts by email, specify the email address of the clerk in the Email Address field. Ensure that the Email Trace flag is set to Y to receive trace messages.

To receive staff alerts by SMS, specify the cell phone number in the Cell# field. The phone number can be typed in without hyphens and MUST be prefixed with a 1 (i.e:19059401924)

Trace Messages:

ALL trace messages, staff messages or automatically generated messages that are sent to a clerk can also be sent to their intended recipient's email account during the night audit process on their due date.

NOTE: Once activated, any messages from the past 5 days with a status not set to done will be emailed.





Alerts

The alert features in Maestro differ from trace messages due to the fact that Maestro does not save the alerts. Alerts can also be sent to a staff member's cellphone.

Room Occupancy Alert Service Setup

An alert can be generated automatically when the overall occupancy in a specified building is reached for a particular date range. Note that the alert can be sent as a system generated trace message, email, or SMS.

A number of alerts can be configured for different buildings and/or date ranges.

The setup for the Room Occupancy Alert can be found in the Front Desk Maintenance Module.

Setup | Alert Configuration | Room Occupancy Alerts

😮 Room Occupancy Alert [nwind] - Northwind Hotel & Conf Cen		
<u>File Record Window</u>	Help	
Record ID	3	
Start Date	07/04/2011	
End Date	09/01/2011	
Building	ENW	
Current Occ %	80.00	
Email	maestro@maestropms.com	
SMS #	19059401924	
Alert Clerk	NWIND	

Press F6 to create a new alert:

Record ID	The record number of the alert. This is
	automatically populated when creating a new
	alert
Start Date/ End Date	The dates for which the alert is valid for
Building	The building for which the alert is valid for. An
	F8 lookup can be performed.
Current Occ %	When the building occupancy reaches the
	same percentage specified in this field, the
	alert is sent.
Email	The email address to which to send the alert.
	NOTE: Email setup in Global Maintenance
	must be set up.
SMS #	The cell phone number to send the alert to
Alert Clerk	The clerk to send a trace message to. If the
	clerk is set up to receive emails or texts
	through trace messages, Maestro will send
	them also. An F8 lookup can be performed to
	alert the appropriate clerk group or an
	individual clerk

NOTE: If Email, SMS# and Alert Clerk fields are all entered, the alert will be sent to recipients listed in all three fields.





Room Occupancy Alert Activation

Alerts behave like a front-end interface. It is suggested that the Room Occupancy Alert Service be run on a workstation that is not used often or on the same location as other interfaces.

Activation of the alert is done through the Front Desk Module: Audit | Alerts | Room Occupancy Alert Service



Repeat Interval	The numbers of minutes that Maestro will cycle through to monitor the conditions set out by the alerts created. From the above example, Maestro will check the conditions of the alerts every 10 minutes
Confirm?	By typing a Y and pressing Enter, will activate the alert. This must be performed for every new alert created after the last activation

After confirming to run the alert, the Maestro windows can be minimized but must be kept running in the background.

Group Allocation Alert Service Setup

An alert can be generated automatically when a group picks up 100% of the rooms blocked on the group master. These alerts can be configured on a room type by room type for each group, or for all rom types by group basis. Note that the alert can be sent as a system generated trace message, email, or SMS.

The setup for the Group Allocation Alert can be found in the Front Desk Maintenance Module: Setup | Alert Configuration | Group Allocation Alerts

Group Allocation Alert [nwind] - Northwind Hotel & Conf C		
<u>File Record Window H</u> elp	<u>File Record Window Help</u>		
0 🕽 🚜 🖟 😫 🔓 😢 🙄 🚭 色 🖲 🕲 📰			
Record ID	3		
Grp Reservation#	20962		
Building	NWR		
Room Type Code	PSD		
Email	maestro@maestropms.com		
SMS #	19059401924		
Alert Clerk	NWIND		





F6 to create a new alert:

Record ID	The record number of the alert. This is automatically populated when creating a new alert.
Grp Reservation #	The group reservation number for which the alert is valid for
Building	The building for which the alert is valid for. An F8 lookup can be performed
Room Type Code	The room type for which the alert is valid for. An F8 lookup can be performed
Email	The email address to which to send the alert
SMS #	The cell phone number to send the alert to
Alert Clerk	The clerk to send a trace message to. If the
	clerk is set up to receive emails or texts
	through trace messages, Maestro will send
	them also. An F8 lookup can be performed

Group Allocation Alert Service Activation

Alerts behave like a front-end interface. It is suggested that the Group Allocation Alert Service be run on a workstation that is not used often or on the same location as other interfaces.

Activation of the alert is done through the Front Desk Module: Audit | Alerts | Group Allocation Alert Service

Group Allocation Alert Windows Service [nwind] - Northwin		
<u>File R</u> ecord <u>H</u> elp		
Repeat Interval 10 Confirm? (Y/N) 10		

Repeat Interval	The numbers of minutes that Maestro will cycle
	through to monitor the conditions set out by the
	alerts created. From the above example,
	Maestro will check the conditions of the alerts
	every 10 minutes
Confirm?	By typing a Y and pressing Enter, will activate
	the alert. This must be performed for every new
	alert created after the last activation

After confirming to run the alert, the Maestro windows can be minimized but must be kept running in the background.





Alert Staff

An alert can be sent to a particular clerk, group of clerks or all clerks in the form of an email, SMS, or both.

Alert Staff [nwind] -	Northwind Hotel & Conf Center
File Record Window	
Email Subject	
Message	
Clerk/Group Message Type	
	Send

Email Subject	The subject of the email. NOTE: The subject line will not appear in the SMS message sent to a phone.
Message	The main body of the message. The text will not word wrap.
Clerk/Group	The message can be sent to either a single clerk or a group of clerks. To select a recipient, press F8
Message Type E E-MAIL S SMS B BOTH	Email : The message will be sent to the recipient's email account SMS: The message will be sent to the recipient's phone as a text message
	Both: The message will be sent both to the recipient's email account and phone.

Alert Guests

An alert can be sent to all in-house guests that are associated with a particular group reservation, guest type or rate type. Maestro uses the email address, cell phone number or both that are associated with the client profile

NOTE: If a cellphone or email address is entered in a group master, a guest alert will NOT be sent to these accounts.

Alert Guests [nwind] - North	hwind Hotel & Conf Center	
Eile Becord Window Help		
Email Subject		
Message		
Grp Reservation# Guest Type Rate Type Message Type		
	Send	





Email Subject	The subject of the email
	NOTE: The subject line will not appear in the
	SMS message sent to a phone
Massaga	The message of the quest plott
Crp Deservation#	The group recervation number. An E9 Lookup
GIP Reservation#	The group reservation number. All F6 Lookup
	can be used to search for the group of users
	can directly type the group reservation number.
Guest Type	The guest type. An F8 Lookup can be
	performed or users can directly type in the
	guest type.
Rate Type	The rate type. The first field is the Rate
	Category and the second field is the Rate
	Type. Alerts can be sent for both room and
	non-room rate types. Both fields utilize the F8
	lookup.
	NOTE: Rate type must appear on the
	Assignment Chart for an alert to be sent
	Email: The message will be sent to the
	recipient's email account
E E-MAIL	
S SMS	SMS: The message will be sent to the
R ROTH	recipient's phone as a text message
	Both: The message will be sent both to the
	recipient's email account and phone.

Soft Check In Alerts Setup:

To set up Soft Check In, please refer to the Soft Check In Quick Reference Guide. The housekeeping and front desk notification defined defaults are set up in Front Desk Maintenance.

The cellphone number and email address are automatically populated based on the information in the client profile.

When the housekeeping status of the room is changed to Vacant AND Clean, Maestro will automatically send a message to the guest's cell phone or email.

To Format the Emails/SMS that are sent to the guest, front desk, and housekeeping, log into Front Desk Maintenance.

Front Desk Maintenance | Front Desk Global | Window | By Property | Format Then select which message to format.



Emails and SMS formatting for front desk, housekeeping, and guests utilize the same screen to format messages.





(
Message Formats [nwind] - Northwind Hotel 8	. Conf Center	
<u>File R</u> ecord <u>W</u> indow <u>H</u> elp		
MESSAGES TO FRONT DESK	SMS TEXT MESSAGES	
TEXT TO SEND	SMS for FD/ room is deaned	
Use [resv] for reservation number	Use [bld] for building	
Use [guest] for guest name	Use [room] for room code	
e.g Room [bld] / [room] has been cleaned for [resv]	- [guest]	
will send Room a / 101 has been cleaned for 16543	- M/Ms John Barrymore	

When formatting the message, users will integrate markers as part of the text. These markers will link information from the reservation and incorporate it into the message being sent out.

Soft Check In Alert Activation:

When checking in a guest into a dirty room, the Soft Check In Information screen will display. Enter either the guest's cell phone number and/or the email address into the fields shown below.

Soft Checkin Information [pat] - Northwind Hotel &	Conf	
Eile Record Help		
Resv. Number 20834 Pa	atrick Liu	
Notify Housekeeping Immediately		N
When room has been cleaned	Notify Front Desk	Y
	Cell Phone Number for Guest	
	Email Address for Guest	

Work Order Email\SMS Integration Setup

Once a work order has been created, an email or SMS can be sent to the contractor linked to the work order at any time. The contractor must be set up with an email address and/or cell phone number. To configure contractors and their contact information, log onto Work Order Maintenance.

Work Order Maintenance | Codes | Contractor Maintenance





Scontractors Maintenance [pat] - Northwind	Hotel & Conf			
Eile Record Window Help Image: State of the state o				
Contractor Name	Cell Phone	Email Address	Msg	
BOB THE BUILDER	19055551234	Bob@thebuilder.com	E	
MANNY THE HANDY MAN	14165551212	manny@hotmail.com	s	

Contractor Name	Name of the contractor
Cellphone	Cell phone number of the contractor
Email Address	Email address of the contractor
Msg	Select the method to send the work order to
E E-MAIL	the contractor.
S SMS	Email, SMS, or Both
B BOTH	

Work Order Email/SMS Activation

To send the message to a contractor, a work order must be completed. An F8 Lookup can be done in the Contractor field to select the appropriate contractor.

🔹 Work Order Request Informatio	n [pat] - Northwind Hotel	
<u>File Record Window Help</u>		
2 🔊 🗞 🐇 😫 🔇		
Create		
Work Order No	Category Level Of Urgency	
Status	Status Change	
Problem Type	Item Code Mailbox	
Trade Type Req.	Area ID	
Description		
Requestor Name		
Inspected By		
Inspection Date		
De avvert Data	Desired Gran Data	
Call In Date	Time Completion Date	
Contractor		
Estimated Cost	Revised Estimate	
Actual Cost	Billed Amount	
A	Tut [Class
Account	lext	Close

When exiting the Work Order Request Information screen, a dialogue box will appear asking the user to send a message to the contractor. The type of message sent is determined in the Contractor Maintenance screen in Work Order Maintenance. Conversely, users can go to the Window dropdown menu and send the message to the contractor manually.

Windows | Send Message

Dialog	×
Send Message to Contractor?	
Send	Cancel

