



# Email Integration with Front Desk Quick Reference Guide

## 1 Email Integration with Front Desk

Email integration in Maestro is a combination of Traces and Forms.

- Like Traces, emails are set up to be sent a certain number of days before or after a specific event.
- Like Forms, the contents of the emails are built using sections and markers.

There are, however, a few differences. While email headers are created as soon as the user indicates that the guest would like to receive emails, the actual body of the email is not built until the email is due to be sent. This allows the reservation to change dates, or rates, or any other such values without updating the email before it is sent.

There are two ways in which emails can be built and sent:

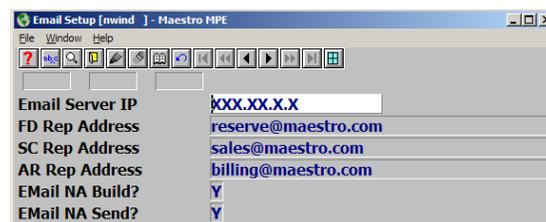
- As part of the night audit, so that no manual intervention is needed
- In a manual process available under **Maestro's Global** module.

In addition, building and sending the emails have been separated. It is possible to have the **Night Audit** build the emails. They can then be sent manually the next day. In the Windows environment, we are using the See4C library set to handle the actual email transmission. This should be transparent to the end users, except if they are sending HTML-format emails that include graphics. Please refer to the See4C documentation for information on how graphics should be named and referred to within the body of the HTML document

## 2 Maestro Setup

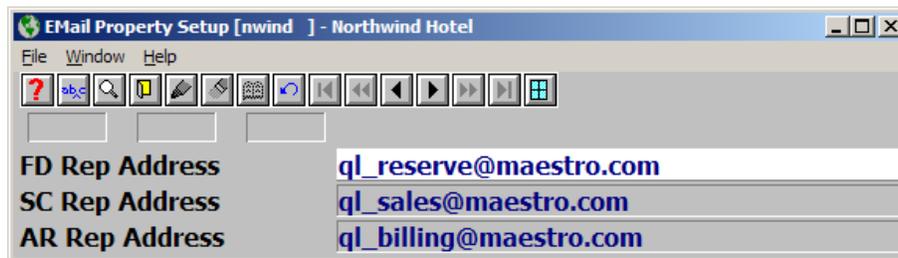
### 2.1 Email Setup

1. Open a **Global Maintenance** session
2. Select **Mail > Email Setup** This takes you to the **Email Setup** screen



3. Fill in the following fields

Field name	How to use it
Email Server IP	IP Address for your email SMTP server
Rep Addresses	Address(es) that you want a guest to reply to, after receiving an email. When the guest hits the “reply-to” button, this is how the response is addressed for <b>Front Desk / Sales and Catering / Club and Spa</b> reservations.*
Email Night Audit Build	Y = The <b>Night Audit</b> builds all necessary emails for that day N = Emails are not automatically built by the <b>Night Audit</b>
Email Night Audit Send	Y = The <b>Night Audit</b> sends all necessary emails for that day N = Emails are not automatically sent by the Night Audit



In a multi-property, the user can create up to 3 different reply addresses for each property.\*

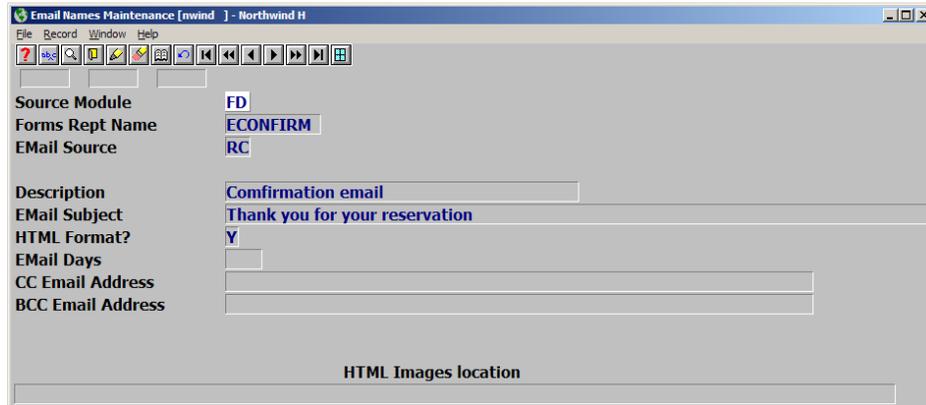
4. Select **Window > Property Defaults** This takes you to the **Email Property Setup** screen.

Enter the “reply-to” email addresses for the following modules on that individual property:

- Front Desk
- Sales and Catering
- Accounts Receivable

\* **Note:** All email addresses are property-specific

## 2.2 Setting Up Email Events



1. Open a **Global Maintenance** session
2. Select **Mail > Email Names Maintenance** This takes you to the **Email Names Maintenance** screen
3. Fill in the following fields

Field name	How to use it
Source Module	FD = Front desk SC = Sales & Catering * A/R = Accounts Receivable * * For future development. At present, the Source Module is always = FD
Forms Rept Name	User defined
Email Source	<ul style="list-style-type: none"> <li>• RC: After a reservation is confirmed or changed</li> <li>• RA: Before a guest's arrival date</li> <li>• RD: After a guest departs</li> </ul>
Email Subject	Subject line that displays on your email
HTML	Y = Includes <b>html</b> formatting tags that the user created in the body of the email. <b>Note:</b> "Y" does not convert your email into HTML format unless the tags have been manually included in the form
Email days	Number of days before or after an event the email should be sent
HTML Images location	If sending emails in HTML format, this is the directory in which any images included in the email are located. For image names, please see the documentation for See4C

### 2.2.1 Attaching forms to events

From the **Email Names Maintenance** screen, you can go to the **Email Detail Maintenance** option to set up which forms comprise the email. To do this:

1. Open a **Global Maintenance** session
2. Select **Mail > Email Names Maintenance** This takes you to the **Email Names Maintenance** screen
3. **Window > Email Detail Maintenance**

This works in the same way as regular **Maestro** forms – the user sets up forms, complete with markers, and then a combination of these forms is used to build the email. Only specific forms sources are available. These will work exactly as they do when setting up **Maestro** forms in **Front Desk**. They have the same information and the same markers.

- Act\_head
- Allinv
- Cminv
- Payments
- Cmfccdtext
- Fdcustres
- Fdres\_adv
- Fdresabtxt
- Fdresserv
- Fdresnames
- Fdroom\_det
- Fdroomresc
- Msg\_head
- Msg\_text
- Reg\_text
- Prebill

### 2.2.2 <html\_marker> fields

**Maestro** forms do not handle single-character HTML marker codes, for example: <p>, <u>. To remedy this, we have set up an html\_marker group set.

Examples of tags in this group are:  
 Paragraph Break is <html\_marker.p>  
 Underline begin is <html\_marker.u>  
 Bold begin is <html\_marker.b>  
 Italics begin is <html\_marker.i>

All other html tags remain the same.

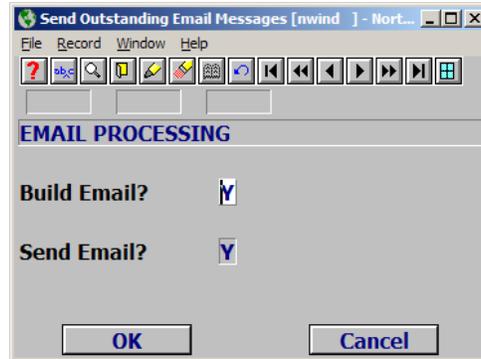
For example:  
 Underline end = </u>, without the html\_marker group indicator.

### 3 Building / Sending Emails

There are two ways in which emails can be built and sent: automatically, during the **Night Audit**, or manually.

To determine whether emails are built and sent manually or automatically:

1. Open a **Global Maintenance** session
2. Select **Mail > Sent Outstanding Email Messages** This takes you to the **Send Outstanding Email Messages** screen



3. Fill in the following fields:

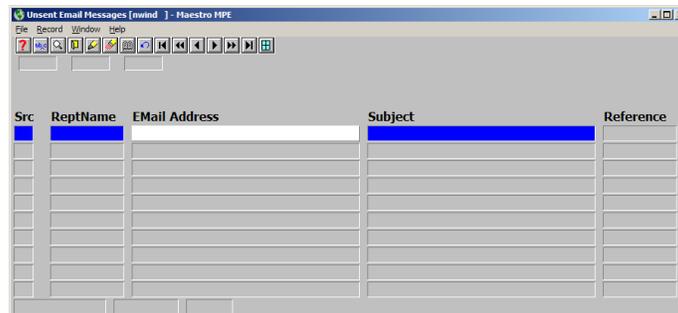
Field name	How to use it
Build email?	Y = All emails due to be sent on the current day are built when the user hits the enter key to leave this field
Send email?	Y = All built email that are due to go today are sent when the user hits the enter key to leave this field

#### 3.1 Manual Process

To display the header information for all emails which have been built but not sent:

- Select **Window > View Unsent Messages**

From this screen, the user can delete messages or edit the text of a message.



## 3.2 Automatic Process

If the **Night Audit Build** and **Night Audit Send** options have been turned on, email integration with Front Desk processing is complete. All emails will be built and sent as part of the night audit, with no manual intervention necessary.

## 4 Front Desk Changes

### 4.1 Guest would like to receive Email

To indicate that a guest would like to receive email, place an “E” in the **Send Confirm** field of the **Guest Reservation**. When the user does this, **Maestro** displays a screen requesting the email address to which the emails should be sent. At this point, the headers for all emails that apply to the reservation are created. The text of the email is built until it is time to send the email. If a user wishes to view the email that will be sent to the guest, it can be accessed by going to **Addresses > Email address** which shows the screen where the user enters the email address

### 4.2 Viewing Emails

There is a new option available under the *Window* menu on the **Guest Reservation** screen (fd0200) – *Email Messages*

Src	ReptName	EMail Address	Subject	Date Sent
RC	CONFIRM	ewilliams@maestro.com	Thank You for your upcomi	
RD	THX	ewilliams@maestro.com	ThankYou	

1. Open a **Front Desk** session

2. Select **Reserve > Guest Reservation** This takes you to a blank Guest Reservation screen. Locate the reservation for that guest.

3. **Addresses > Email Messages** This takes you to the **Email Messages** screen.

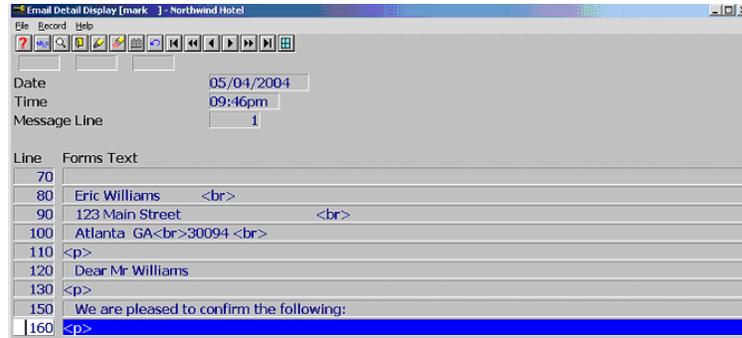
A user can delete a message at any time before it is sent. In addition, a user can:

- See the date the email was sent. In the example to the left, the emails listed have not yet been sent.
- Edit the detail of the email after it was built but before it was sent. To do this, highlight the email and follow the steps in section 4.2.1.

A user can also re-send the email and has the option of resending it to a different email address. For instructions, see section 4.2.2.

#### 4.2.1 Edit the Email Details

1. To edit the detail of the email, select **Window > Email Detail** This takes you to the **Email Detail Display** screen.
2. Overtyp/delete any information on this screen.



#### 4.2.2 Resend the Email

1. To resend an email, select **Window > Requeue Message**
2. You may also make a change to the email address.

