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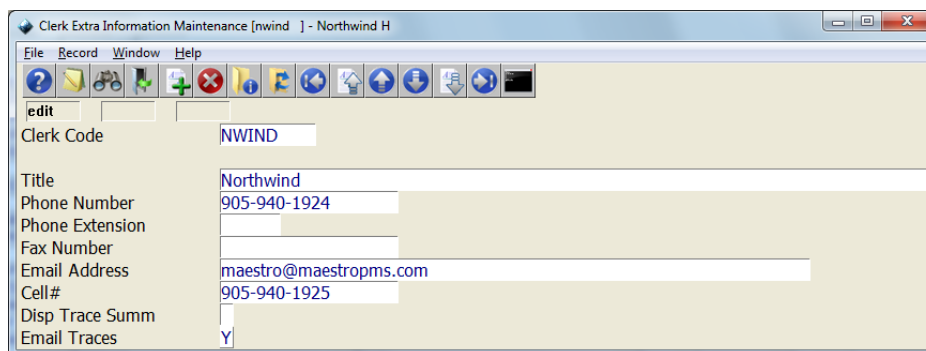
To receive trace messages and staff alerts by email, specify the email address of the clerk in the Email Address field. Ensure that the Email Trace flag is set to Y to receive trace messages.

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
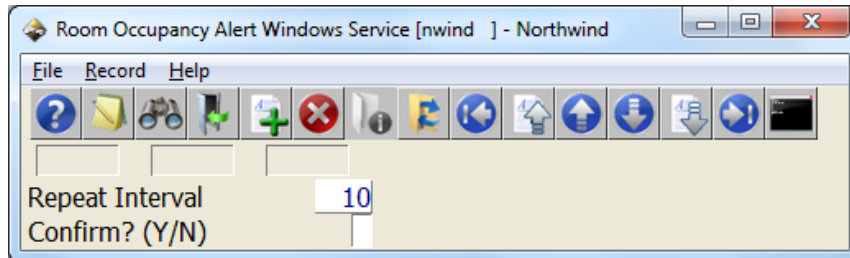

Press F6 to create a new alert:

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:
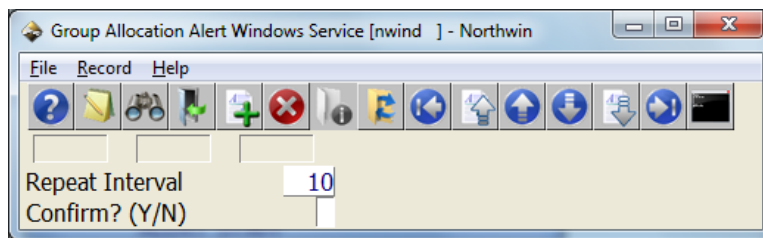Setup | Alert Configuration | Group Allocation Alerts
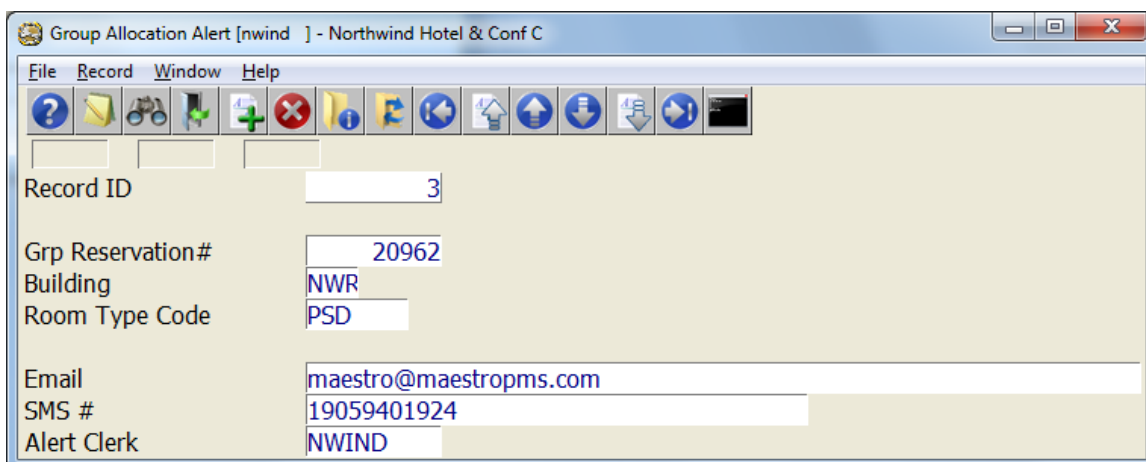
F6 to create a new alert:

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

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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.
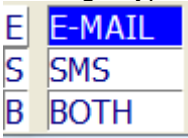
Alert Staff

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

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.

Email Subject	The subject of the email. NOTE: The subject line will not appear in the SMS message sent to a phone.
Message	The message of the guest alert
Grp Reservation#	The group reservation number. An F8 Lookup can be used to search for the group or 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.
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.

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.
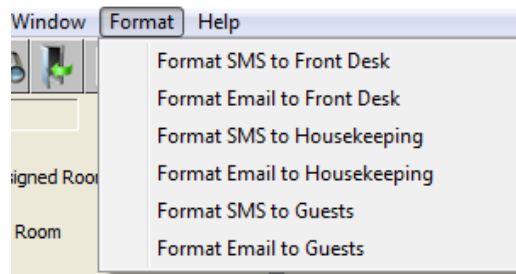
Emails and SMS formatting for front desk, housekeeping, and guests utilize the same screen to format messages.
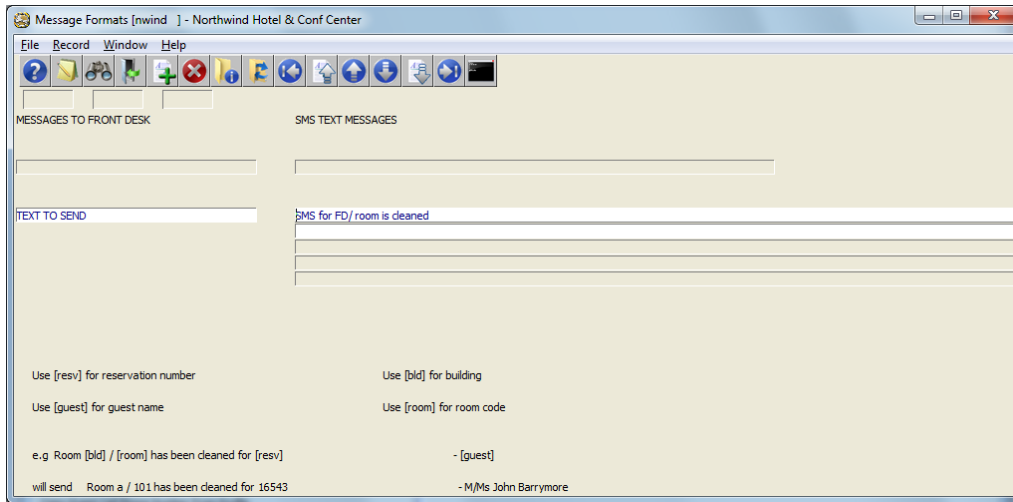
When formatting the message, users will integrate markers as part of the text. These markers will link information from the reservation and incorporate it into the message being sent out.

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.
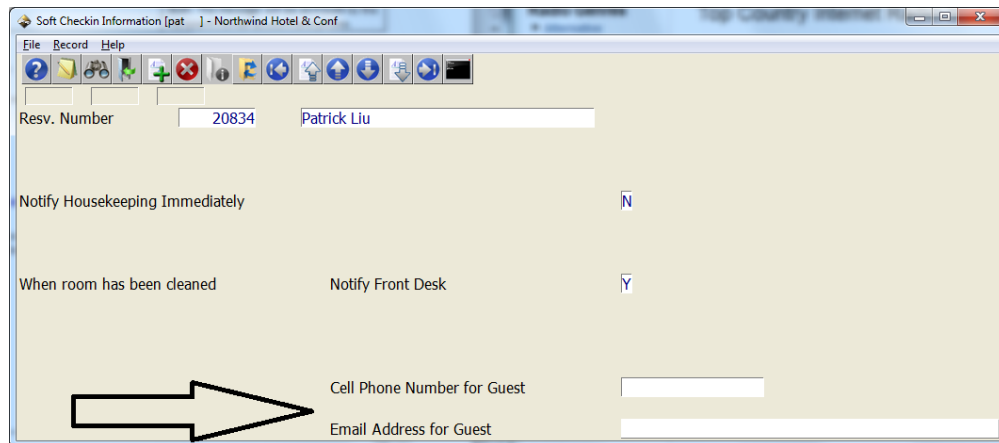
Work Order Email\SMS Integration Setup

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.
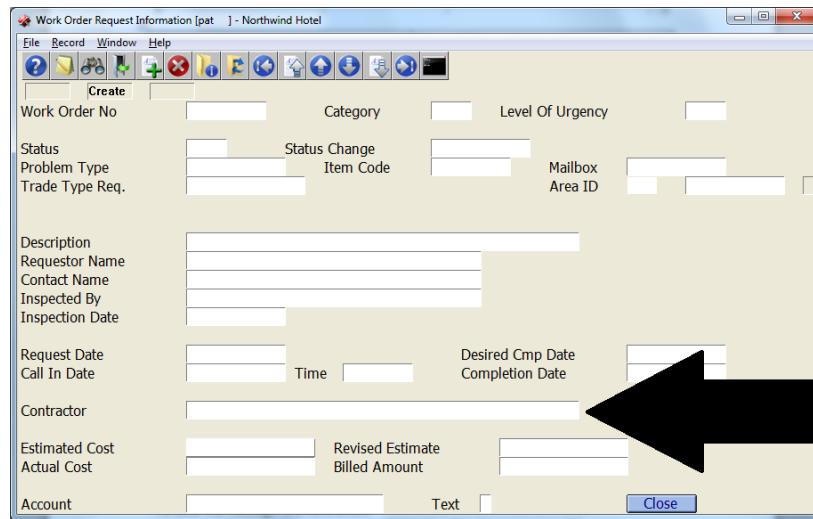
Work Order Maintenance | Codes | Contractor Maintenance

Maestro
PMS like no other.
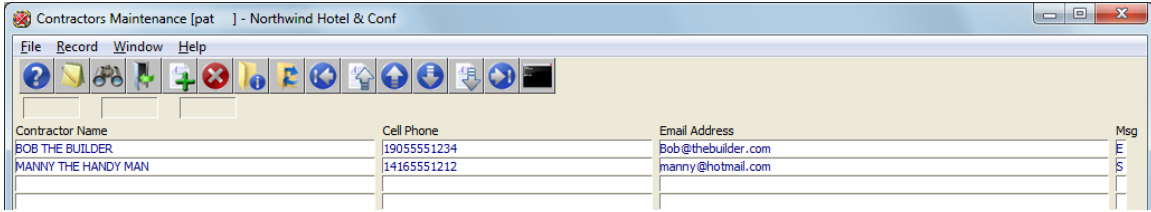
Contractor Name	Name of the contractor
Cellphone	Cell phone number of the contractor
Email Address	Email address of the contractor
Msg	Select the method to send the work order to the contractor. Email, SMS, or Both
E E-MAIL S SMS B BOTH	

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.

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