CSV File Export
Quick Reference Guide

Contents

1 Overview

This Quick Reference Guide will explain the setup and procedures required to export Maestro reports as a Comma Separated Value (CSV) file. This will allow the users to manipulate the data within a spreadsheet program as they see fit. Additionally, users may also choose to email the CSV fie based on their Maestro clerk code setup.

It is assumed that the reader is familiar with:

- Maestro User Interface
- Microsoft Windows Operating System
- 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 for users to receive email messages
    - To configure clerks to receive emails, please refer to the Email/SMS Integration QRG

2 Setup

2.1 Configuration of Destination Folder

Create a Windows folder on the N:\ drive, or the Maestro mapped drive.
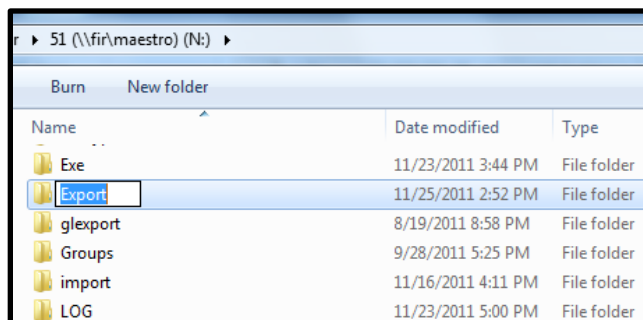
Maestro

If Maestro Web is being used, then the drive must be the full UNC (Universal Naming Convention) is needed. A UNC may look like the following:

\\881834-maestro\northwind\export\

2.2   Configuration in Maestro

Select **Global Maintenance** | Select **Reports** | Select **CSV Export Setup Maintenance**

Field	Action or Description
Record Number	Automatically created when the user presses the F6 Create Button.
FD Rep Address	This is the email account from which the reports will be sent from. The email address does NOT need to be a valid email address.
CSV Save Dir	The directory to save the file. Input the path of the folder that was created in section 2.1
Text Qualifier	Input a double quotation mark (") in this field.
Field Delimiter	Input a comma (,) in this field
Date Separator	Input a forward slash (/) in this field.
Date Format M MM/DD/YYYY N MM/DD/YY D DD/MM/YYYY Y YYYY/MM/DD A YYYYMMDD (NO SEPARATORS) B YYYYMM (NO SEPARATORS)	The date format chosen here will reflect on the CSV file once exported.

3   Running the Report

Currently, the report export is only available for a limited number of reports in the following Maestro modules:

- Front Desk
  - Guest UserFields Arrivals/Inhouse
  - Room Type Space Chart
  - Group Billed Report
  - Revenue Forecast Report
  - Pax and Occupancy Forecast
  - Detail Pax and Occupancy
  - Pax/Occupancy/Revenue Forecast
  - Room Occupancy Forecast
  - Clerk Reservations and Performance
  - Room Revenue Summary
  - Rent Roll
  - Meal Plan Guest List
  - Meal Plan Guest Count
  - GEM Guest Satisfaction by Clerk
  - Tax Exemption
  - Shift Report
  - Posting Audit Report
  - Manager's Dashboard Report
  - Manager's Revenue Report
  - Revenue to Budget Pace
  - Manager's Pace by Type
  - Extended Manager's Pace by Type
  - Yielded Rates
  - Guest Folios
  - Guest Ledger
  - City Ledger Transfer
  - Rates Posting Audit
  - Daily Balancing Audit Report
  - Night Audit Posting
  - Closing Balance
  - Charge Transfer
  - Advance Deposit Requested
- Sales and Catering
  - Advance Deposit Analysis
  - Revenue by Booking
  - Trace Message Summary
- Spa and Activity
  - Service Report
  - Provider Gratuity
  - Member Owner Summary
- Retail Point of Sale
  - Provider Gratuity
- Accounts Receivables
  - Aging Report
- Owner Management
  - Owner Aging
  - Owner Ledger
  - Owner Statement Summary
  - Owner Commission Room Revenue

To export a report, navigate to the report. Run the report in a CSV format by pressing on the CSV button.

1) After clicking on the CSV button, the report is converted to a CSV file and is automatically saved to the destination folder created in Section 2.1.

2) The user is then given a choice whether to email a copy of the CSV file to the user's account.
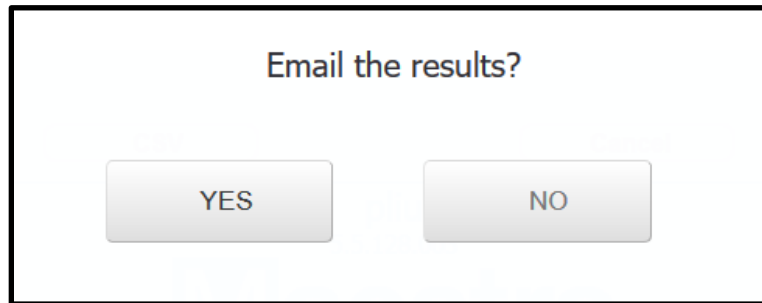
3) If No is chosen, For **Maestro Web users**, the report will generate in the Report List

4) For **Maestro Windows users,** a prompt will display for Maestro Windows informing the user where the CSV file is located and the name of the file
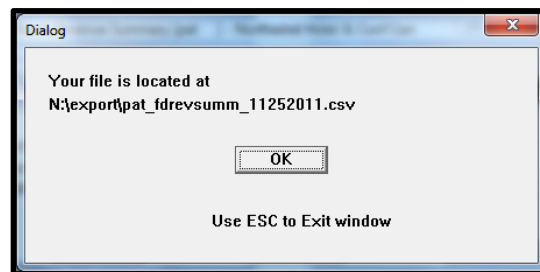
5) If **Yes** is selected, the CSV file is automatically emailed to the user's email based on the setup of the clerk code

6) If an email address is not associated to the user's clerk code, the Report Email Collection screen will appear
   a. Users can enter their email address or a list of email addresses by pressing **Create (F6)** to create a new line
   b. When the user is finished entering the email, press **Save/Exit (F4)** to exit the screen.

7) The CSV file will now be sent to the user's email and all the emails entered in the Report Email Collection screen

8) If an email address is associated to a clerk code, an additional prompt will display to ask the user if additional email addresses are needed

Send the results to others as well?

YES   NO

9) If **Yes** is selected, the Report Email Collection screen will appear and users can enter additional email addresses
   a. Use the **Create (F6)** to create additional lines to enter the email addresses.
   b. When the user is finished entering the email, press **Save/Exit (F4)** to exit the screen.

Maestro