

# How to Set up Booking, Client and Contact Traces for Sales & Catering

## Quick Reference Guide

Trace codes can be setup for and applied to bookings, clients and contacts within Maestro Sales & Catering.

*Booking Traces* are trace codes which may be set up to occur a specified number of days *Before the Booking Occurs*, *After the Booking is Made* or *After the Booking has Occurred*. Booking traces may also be assigned manually to a booking as required. Booking Traces are setup and managed with Sales & Catering Maintenance.

Client and contact traces are time and date driven trace codes that can be setup to be applied automatically or as required by users. As client and contact traces codes apply to all clients that are entered into Maestro and not Sales & Catering clients only, it is recommended to manually assign these trace codes to clients and contacts only when needed in Sales & Catering.

### Booking Traces

To set up new booking trace codes or modify existing trace criteria, begin from the main **Sales & Catering Maintenance Screen**.

Select the **Codes** Menu

And then select **Trace Code Maintenance**

Tr Code	Description	Tr Days	Tr Src	Clerk
BEO	BEO Meeting	7	BA	
CALL	Please Call			
CONT	Contract Due	14	AB	
INFO	Information			
ROOM	Rooming List Due	14	BA	
THX	Thank You Letter	7	AE	

**TR Code** – enter the trace code name to be displayed, up to a maximum of six characters.

**Description** – enter the description for the trace code that will be displayed when printed on the Trace Messaging Report in Maestro.

**TR Day s-** this field works in conjunction with the TR Src field and is used to indicate the number of days before or after the Tr Src has occurred, that a trace should be automatically generated. Leaving this field blank will mean that the Trace will be applied on the same day as the Tr Src.

**TR Src** – use the Lookup key to select BA – Before Arrival, AB – After Booking or AE – After Event. Leaving this field blank will allow this trace to be manually associated to a booking but the trace will not be generated automatically by Maestro.

**Clerk** – leave this field blank to have the trace automatically assigned to the account manager or use the Look up key to assign a specific user name, whom this trace will be automatically assigned to.

**\*\* It is not recommended to delete any existing booking traces codes prior to contacting Support, as these trace codes may be applied to existing bookings in Maestro \*\***

### Client & Contact Traces

Trace codes to be used for both Clients and Contacts Traces are setup in Global Maintenance and may be used for clients in all Maestro modules but are most often used with Sales & Catering. The trace codes for both Clients and Contacts are shared in Maestro and are setup in the same area of Global Maintenance.

Begin from the main screen and select the **Codes** Menu.

Then select **Trace Code Maintenance**.

Tr Code	Description	Tr Days	Tr Src
CALL	Call Client		
FOLL	Follow Up		
LOG	Sales Call Log		
MTG	Meeting		
NTF	Note to File		
SEND	Send Info		
SERV	Guest Service Required		
SITE	Site Visit		

**TR Code** – enter the trace code name to be displayed, up to a maximum of six characters.

**Description** – enter the description for the trace code that will be displayed when printed on the Trace Messaging Report in Maestro.

**TR Day s-** Leave this field blank to manually assign traces to clients or contacts in Maestro as required.

**TR Src** – Leave this field blank to manually assign traces to clients or contacts in Maestro as required.