BUILDING NOTIFICATION RULES

1:15pm – 2:00pm

Sandokan Stage
EMS Software | Implementation Consultant

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Agenda

- Notification Overview
- Building a Notification Rule
- Understanding the benefits to a rule
Notification Types
Notification Rule Types

• Bookings
• Service Orders
• Anything On a VIP Event
• New Everyday Users
• User Defined Fields
• Attendees
Notification Delivery Methods

- Dashboard (EMS User)
  - Notifications appear within EMS Desktop Client and the Dashboard tool

- Email
  - Received in recipient’s email inbox. Used primarily for infrequent EMS users or those without EMS Client access.
Notification Rule Benefits

- Improve communication to those who want to stay informed of certain activities
- Automate the informative process, not reliant upon:
  - Subjective interpretation
  - User action to send emails
- Dashboard notifications improve communication amongst team members (marking items as ‘Reviewed’ indicates ownership of notification)

- Dashboard offers collective organization of notifications
- Tracking on email notifications (in Email History)
Configuring a Notification Rule

- Step 1 – Name the Rule
- Step 2 – Identify the Notification type
- Step 3 – Identify the Sourcing
- Step 4 – Identify the Display Preference
Configuring a Notification Rule Cont’d

- Step 5 – Identify who will be notified

- For email notifications to be sent, the EMS Email Notification Service must be installed and configured
Configuring a Notification Rule Cont’d

- Step 6 – Identify which location to notify
Configuring a Notification Rule Cont’d

- Step 7 – Choose your statuses
Configuring a Notification Rule Cont’d

- Step 8 – Select your Event Types
Configuring a Notification Rule Cont’d

- Step 9 – Confirm your Summary

Summary: Notify Users, sandokan.stage@emssoftware.com of New Bookings within 0 days prior to the Booking date in the following Rooms with the following Statuses of the following Event Types from EMS Client and Virtual EMS
If you want to include the subject line when notifications are sent, click on the ‘email’ tab. Same action would apply if you would like to change the ‘from’ email address.
Notification Rule Testing & Troubleshooting

**Testing**

- Users cannot test notification rules to themselves via the Client.
- Ensure users receive notification via all channels (Dashboard and/or email).
- When configuring new notification rules, use your own email address as the recipient of email notifications for testing purposes. Once you have confirmed it is working correctly you can swap it out with the intended email address.

**Troubleshooting**

- Ensure that ALL of the filter criteria are met by your test booking. Compare it to the Notification Rule screen by screen.
- If you can’t get an email notification to work, try setting it up to go to both a user’s Dashboard and email address. If the notification is received in the Dashboard but not via email, you will have focused the issue to the Email Notification Service on your server. Pursue this with your IT staff (see next slide).
Email Notification Service Set-up

Windows Service

- Standard .MSI installer
- Installed on a single machine (web or db server)
- One service can handle multiple databases (if necessary)
- Set SMTP settings, server, database, and interval
- Service “wakes up” and sends email notifications at interval setting
- Interval must be greater than 0, but recommended as 5 or higher
Summary

• Notification Rules determine which EMS users are emailed about additions or changes that are made in EMS. You can set these rules to trigger for new or changed bookings or service orders, changes to VIP events, new web user accounts, or when specific UDF options are selected. Triggers are based on rooms, statuses, event types, group types, setup types, and/or categories.

• For a Notification to be generated, all the criteria in the rule must be met. Typically, notifications are an internal function for reservation schedulers and service providers, but when you are configuring a Notification Rule, you can specify the email address for whomever you wish to receive an Email Notification.
Questions?
NOTIFICATION RULE TYPES

Thank You!

Sandokan Stage
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Sandokan.Stage@emssoftware.com
Office: 303-740-4825
https://www.linkedin.com/in/sandokanstage