

Master Your Guest Communications Through Triggers & Automations

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NEXT
SESSION

The **Heart** of Hospitality

Agenda

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- Available Actions
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- Tips, Tricks, and Helpful Reminders
- Q&A/Wrap-Up

Session Goals

Uncover the power of Track's automated messaging tools to optimize guest communications. This session shows how to set up and customize triggers for important guest interactions, from booking confirmations to follow-up emails. Attendees will learn to enhance guest satisfaction and retention by implementing thoughtful, automated engagement points.



Trigger vs. Automation

What's the difference?

Trigger

Event-based automation

Triggers operate based at the time of the **occurrence** of predefined events in Track, such as:

- Reservation creation, confirmation, cancellation, or modification
- Reservation's check-in or check-out
- Lead creation

Automation

Time-based automation

Automations operate based on a **time-relation** to events in Track, such as:

- X number of hours after reservation creation or confirmation
- X number of hours before check-in or check-out
- X number of hours after a Lead was created

The background of the slide features a blurred image of two hands interacting with a tablet device. One hand is holding the tablet, while the other is pointing at the screen. The entire image is overlaid with a semi-transparent blue and purple gradient.

Conditioning Your Triggers & Automations

Fine-tune when your Triggers & Automations will (or won't) operate

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When configuring most Triggers & Automations, the use of Conditions will be pivotal in determining when the chosen Action(s) should be taken (or, in some cases, not taken). Some key Conditions to consider are:

- **Reservations**
 - Status (i.e. Confirmed or Checked-In)
 - (E-Sign) Agreement Status
 - Unit and/or Unit Node
 - Days Before/After Check-In/-Out
 - Reservation Charge
- **Leads**
 - Status
 - Follow Up Date
 - Last Activity by Guest and/or Agent

ALL vs. ANY

For any Conditions that should be enforced every time, include them in ALL; use ANY for Conditions that are variable (i.e. multiple Unit or Node inclusions)

Conditioning Your Triggers & Automations

Operator Definitions

When using Conditions in your Triggers & Automations, you can choose between different Operators to accomplish different outcomes. Below are the different types of Operators available:

- **In:** include criteria selected
- **Not In:** does not include criteria selected
- **Is:** equal to criteria selected
- **Is Not:** not equal to criteria selected
- **Greater than:** value exceeds criteria selected
- **Greater than and equal to:** value exceeds, or is the same as, criteria selected
- **Less than:** value is under criteria selected
- **Less than and equal to:** value is under, or is the same as, criteria selected
- **Between:** value falls between beginning and end points defined



Available Actions

What actions can Triggers & Automations take?

Available Actions

What actions can Triggers & Automations take?

Once you've configured your Triggers and Automations' Conditions, you can choose what Action(s) you want the automation to perform:

- **Send Document** - sends one of your Reservation Documents (Config > PMS Setup > Reservation Documents)
- **Send Email** - sends an email with the content entered on this screen
- **Send Email Template** - sends one of your Email Templates (Config > CRM Setup > Email Templates)
- **E-Sign Document** - sends one of your E-Sign Documents, configured in Reservation Documents
- **Send Text Message** - sends a text with the content entered on this screen

- **Send Reservation Message** - used for Airbnb communications; will send message through Airbnb's Messaging API

- **(Automation) Create Survey** - use this to create a survey
- **(Trigger) Send Survey (Email, Text Message, or Email Template)** - use this to send a recently-created survey

- **Reminder:** you can utilize more than 1 Action on any given Trigger and/or Automation!



Trigger & Automation Examples

Let's take a look and get hands-on

Reservation Procurement

Trigger - Booking Confirmations (Direct)

Depending on how you're processing new Reservations, you may use this Trigger one of two ways:

1) Upon Reservation Created

2) Upon Confirmation of a new Reservation

- Select applicable Action(s)

Update Trigger

General Information

Name (Guest) Reservation Confirmation

Object Reservation

Event Reservation Created

Start Date

End Date

☒ Run Once

☒ Is Active

Meet "ALL" of the following conditions

+ Condition

Type

not in

Airbnb

Vrbo

HVMI

Channel Manager

Update Trigger

General Information

Name (Guest) Reservation Confirmation

Object Reservation

Event Status Changed

Start Date

End Date

☒ Run Once

☒ Is Active

Meet "ALL" of the following conditions

+ Condition

Status

in

Confirmed

Type

not in

Airbnb

Vrbo

HVMI

Channel Manager

Reservation Procurement

Trigger - Booking Confirmations (OTAs)

Trigger Event, Conditions and Actions will vary for OTA bookings:

A) Airbnb

- Event: Reservation Creation
- Channel > in > Airbnb (or other channel)
- Action: Send Reservation Message

Note: other non-MOR OTAs will operate similarly, but will use traditional Actions like emails, texts, etc.

B) Vrbo & other MOR OTAs

- Event: Status Changed
- Status > in > Confirmed
- Channel > in > (insert channel name)
- Choose desired Actions

Update Trigger

General Information

Name: (Airbnb) Reservation Confirmation

Object: Reservation

Event: Reservation Created

Start Date:

End Date:

☒ Run Once ☒ Is Active

Meet "ALL" of the following conditions + Condition

Channel: in: Airbnb

Meet "ANY" of the following conditions + Condition

Perform These Actions + Action

Please be aware: for Airbnb inquiry responses, if restricted information such as links, phone numbers or email addresses are included in the message, the message may be rejected by Airbnb.

Action: Send Reservation Message

Update Trigger

General Information

Name: (Vrbo) Reservation Confirmation

Object: Reservation

Event: Status Changed

Start Date:

End Date:

☒ Run Once ☒ Is Active

Meet "ALL" of the following conditions + Condition

Status: in: Confirmed

Channel: in: Homeaway

Reservation Procurement

BONUS | Trigger - Owner-facing booking notifications



As an extension of the prior two examples, you can also follow similar logic to let Owners know of new bookings in their Unit(s)

Update Trigger

General Information

Name	(Owner) New Booking Notification		
Object	Reservation	Event	Reservation Created
Start Date	<input type="text"/>	End Date	<input type="text"/>
		<input checked="" type="checkbox"/> Run Once	<input checked="" type="checkbox"/> Is Active

Update Trigger

General Information

Name	(Owner) New Booking Notification		
Object	Reservation	Event	Status Changed
Start Date	<input type="text"/>	End Date	<input type="text"/>
		<input checked="" type="checkbox"/> Run Once	<input checked="" type="checkbox"/> Is Active

Meet "ALL" of the following conditions

+ Condition

Status	in	Confirmed
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Reservation Procurement

Automation - E-Sign Reminders

Identify Reservations that do not yet have a completed E-Sign agreement:

- Hours After Created is a key condition for this one
- Actions can be email, text, or both
- If you want multiple reminders, create additional Automations using different numbers of Hours

Create Automation

General Information

Name E-Sign Reminder

Object Reservation

Start Date

End Date

☒ Run Once

☒ Is Active

Meet "ALL" of the following conditions

+ Condition

Agreement Status

not in

Received X Not Needed X

Hours After Created

is

6

Pre-Arrival

Automation - Travel Insurance Upsells

For guests who opted-out of Travel Insurance during the (direct) booking process, use this Automation to upsell!

Use Conditions to ensure policies are being up-sold within proper timeframes.

Update Automation

General Information

Name (Guest) Travel Insurance Upsell

Object

Reservation

Start Date

End Date

☒ Run Once

☒ Is Active

Meet "ALL" of the following conditions

+ Condition

Hours After Created

is

72

Days Before Check-In

greater than

30

Remaining Balance

greater than and equal to

0.01

Travel Insurance

does not have Travel Insurance

Channel

not in

Airbnb

Homeaway

Pre-Arrival

Automation - Additional Upsells

For guests who've not purchased other available upsells, use an Automation like this one to generate additional revenue.

Create Automation

General Information

Name

(Guest) Additional Upsells

Object

Reservation

Start Date

End Date

☒ Run Once

☒ Is Active

Meet "ALL" of the following conditions

+ Condition

Type

not in

Owner

Reservation Charge

not in

Beach Chair

Concierge Services

Firewood

Golf Cart

Grocery Delivery

Pool Heat

Hours Before Check-in Time

less than

169

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Pre-Arrival

BONUS | Automation - Upsell Fulfillment Reminder(s)



To help ensure the best guest experience for those who've elected for upsells, use an Automation like this one to stay on top of delivery.

Use Actions to alert your teams and/or the proper vendor(s).

General Information

Name (PMC) Upsell Fulfillment Reminder - Pool Heat

Object Reservation

Start Date

End Date

☒ Run Once

☒ Is Active

Meet "ALL" of the following conditions

Type

not in

Owner

Reservation Charge

in

Pool Heat

Hours Before Check-In Time

less than

169

Meet "ANY" of the following conditions

+ Condition

Perform These Actions

+ Action

Action Send Email

To reservations@trackvacationrentals.com

Subject Pool Heat Reminder - {{unit.name}} - {{formatDate reservation.checkin "medium"}}

+ Field

☒ Use Layout

Pre-Arrival

Automation - Balance-Due Payment Reminders

For guests with upcoming payments due, provide them a friendly reminder ahead of the charge.

Update Automation

General Information

Name

(Guest) Upcoming Payment Reminder

Object

Reservation

Start Date

End Date

☒ Run Once

☒ Is Active

Meet "ALL" of the following conditions

+ Condition

Hours Before Payment Is Due

less than

72

Type

in

Guest Vrbo

Remaining Balance

greater than and equal to

0.01

Pre-Arrival

Automation - Arrival Instructions

Provide guests with pertinent information for accessing their Unit upon check-in.

Be sure to use Reservation Message for Airbnb guests

Update Automation

General Information

Name

(Guest) Arrival Instructions

Object

Reservation

Start Date

End Date

☒ Run Once

☒ Is Active

Meet "ALL" of the following conditions

+ Condition

Status

in

Confirmed

Remaining Balance

less than and equal to

0.01

Hours Before Check-In Time

less than

25

Type

not in

Owner

Agreement Status

in

Received

Channel

not in

Airbnb

Post-Arrival

Automation - Guest Service Awareness

After arrival, remind your guests that your team is there to make their stay as best as possible

Create Automation

General Information

Name (Guest) Post-Arrival Guest Service Awareness

Object

Reservation

Start Date



End Date



☒ Run Once

☒ Is Active

Meet "ALL" of the following conditions

+ Condition

Hours After Check-In Time



greater than



1



Status



in



Checked In



Type



not in



Owner



Channel



not in



Airbnb



Post-Arrival

Automation - Post-Arrival Issue Mitigation Survey

After arrival, remind your guests that your team is there to make their stay as best as possible

Update Automation

General Information

Name

(Guest) Post-Arrival Survey Create

Object

Reservation

Start Date

End Date

☒ Run Once

☒ Is Active

Meet "ALL" of the following conditions

Hours After Check-In Time

greater than

2

Status

in

Checked In

Type

not in

Owner Owner Guest Owner Referral

Meet "ANY" of the following conditions

Perform These Actions

Action

Create Survey

Survey

Post Arrival Survey

Pre-Departure

Automation - Departure Instructions

Remind guests of your expectations from them upon checking out.

Update Automation

General Information

Name

(Guest) Departure Instructions

Object

Reservation

Start Date

End Date

☒ Run Once

☒ Is Active

Meet "ALL" of the following conditions

+ Condition

Hours Before Check-Out Time

▼

less than

▼

25

Status

▼

in

▼

Checked In

×

Type

▼

not in

▼

Owner

×

Post-Stay

Automation - Create Post-Stay Survey

After departure, capture guest feedback via a survey; use an Automation like this to create the survey, and the subsequent Trigger (next slide) to send it.

Update Automation

General Information

Name

(Guest) Post-Departure Survey Create

Object

Reservation

Start Date

End Date

☒ Run Once

☒ Is Active

Meet "ALL" of the following conditions

+ Condition

Hours After Check-Out Time

greater than

1

Status

in

Checked Out

Type

not in

Owner Owner Guest Owner Referral

Meet "ANY" of the following conditions

+ Condition

Perform These Actions

+ Action

Action

Create Survey

Survey

Post Departure Survey

Post-Stay

Trigger - Send Post-Stay Survey

Use this Trigger to send your Post-Stay Survey (created via the Automation from the previous slide) to the guest(s).

Update Trigger

General Information

Name (Guest) Post-Departure Survey Send

Object Survey Response

Event Survey Request Created

Start Date

End Date

☒ Run Once

☒ Is Active

Meet "ALL" of the following conditions

+ Condition

Survey Name

in

Post Departure Survey

Meet "ANY" of the following conditions

+ Condition

Perform These Actions

+ Action

Action Send Survey Email

To

Contact

Subject

Survey from Track Vacation Rentals

+ Field

☒ Use Layout

BONUS - Vacancy Upsells



Proactively identify and reach out to guests whose booked Unit(s) have days available before or after their scheduled dates, drive additional nights and revenue.

Can use either pre-arrival or pre-departure.

Create Automation

General Information

Name (Guest) Vacancy Upsell

Object

Reservation

Start Date



End Date



☒ Run Once

☒ Is Active

Meet "ALL" of the following conditions

+ Condition

Type

not in

Owner

Owner Guest

Hours Before Check-In Time

less than

169

Meet "ANY" of the following conditions

+ Condition

Days Vacant (Prior to Arrival)

greater than and equal to

1

Days Vacant (After Departure)

greater than and equal to

1

Perform These Actions

+ Action

Action

Send Email

To

Contact

Cc Bcc

A background image showing two hands interacting with a tablet device. The image is overlaid with a semi-transparent blue and purple gradient. The text is centered on the screen.

Crowd Favorites

Share your key Triggers & Automations for Guest Communication



Tips, Tricks, and Helpful Reminders

Things to keep in mind

Tips, Tricks, and Helpful Reminders

Please keep the following things in mind when navigating your Triggers & Automations:

- **Run Once**
 - Always use for Automations, as well as most Triggers
 - This limits the execution of that specific automation to operating on any object just once. Example: If the object is a reservation, by selecting Run Once the automation will never be sent twice to the same reservation.
- **Unit-level Custom Fields** can be used as Conditions in Triggers & Automations
 - Best for fields that are NOT strings (i.e. text fields)
- **If/Else Statements in Res Docs**
 - Conditional, If/Else statements can be used for some data points in Reservation Documents, which allow the inclusion or exclusion of verbiage; examples include:
 - Presence of Travel Insurance
 - Inclusion of Pets

Q&A | Let's Stay In Touch



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