1.02 Getting Started

Onboarding Videos

Our onboarding videos are the in-depth training tools that we have created to help you understand how to setup and utilize the system to its fullest potential. The tutorial videos and this user manual are a great supplement to these videos.

Onboarding 101

This video is probably the most critical to watch before setting up your Maestro system. Our 101 course walks you through the basics of setting up your system, and provides some best practices that can make the rest of your setup and onboarding much easier. Important files that accompany this video are:

- Onboarding Checklist
- Data Cleaning Checklist
- User Tiers Chart
- Contact Template
- Business Template
- Property Template
- Work Plan Template

Onboarding 201

Especially for those organizations who are utilizing the work plans, this session is a must. Building from the basics we learn in the 101 course, this course takes a deeper dive into the day to day usage of the software.

Onboarding 301

Any system is only beneficial if you can get what you need when you need it. This session predominantly deals with the reporting functionality of Maestro and generating lists so that you can ditch your spreadsheets and make Maestro your organization’s go-to data source.

Understanding the Maestro Modules

Home

This is the user's dashboard where overdue tasks, calendar events, and other statistics can be viewed. There are a variety of widgets to choose from. The user can arrange them in their preferred order and size.

Contacts

This module contains the profiles for all of the organization's contacts (individuals). Examples of contacts include: property owners, business owners, board members, city council members, vendors, partners, community groups, volunteers, residents, out-of-state associates, etc. Contacts can be linked or connected to other contacts (spouse), to businesses, and to properties.

Work Plans

This module serves as a task manager where tasks can be organized by project or event, and Maestro contacts can be assigned to tasks. Those assignments will then populate the dashboard.

Businesses

This module contains the profiles for all businesses companies. Businesses can be linked to contacts as well as properties (as occupant and/or owner). Businesses can also be marked as "in-district" to be included in reporting statistics.

Properties

This module houses all properties within the district. Properties can be marked residential and multiple units can be added to a property.

Events

Use this module to make users aware of any events. Here, work plans and attachments can be linked to an event. This module is essentially a Maestro-facing calendar for people who have access to your instance.

Donations

Use this module to track contact and business donations. The donations will be tied to the donor's record.

Volunteer Opportunities

This module allows you to create volunteer signup opportunities for dates, shifts, etc. and then publish
one link that people can visit to sign up for volunteer roles.

Reports

Maestro provides several canned reports where users can see full report data or summary statistical data.
This module also provides an "Advanced Search" tool which allows users to create custom searches and save
them as reports.

Tools

Here, users can customize drop down menus found throughout the system (including donation options, zoning, TIF, involvements, and others). Also here, users will find the import tool, user list, and organization settings (where integrations are set up).

The Tools module also houses the public improvements and investments and public parking and parks data, titled "Community Investment". For more information on this section, watch the "Settings" tutorial.

Organization Settings

Before entering data, you will find it easier to have setup or input some basic information in the tools section of Maestro.

Settings & Tools

Organizational Settings

Ensure that your organization is setup correctly to make reporting and other functions easier as you begin to use Maestro.

Community Name

This would be the name your organization goes by locally. If your organization’s name is The Springfield Historical District, Inc. but you go by “The District”, you will want to put “The District” in this location.

Community Logo

Upload your organization’s logo. If you have a horizontal version of your logo, we recommend using that (though vertical will work). You can upload png (preferred) or jpg file types.

Mailchimp/Constant Contact Integration

If you have either of these services, connecting them from the beginning will be beneficial. You can read more about this and find the tutorial on these for specifics on how to set them up.

Coordinating Program

Please select if you are a member of either the International Downtown Association or the National Main Street Center (or both). If you are a member of the National Main Street Center, you will be asked to select your Coordinating Program.

Membership Levels

You can setup your membership levels that will be available to add to businesses.
Please note, if your organization has membership levels that include contacts (individuals), you will need to utilize the involvements.

Trainings

The trainings section allows you to enter the trainings that your organization holds and attends. These trainings will be included in your reporting.

Import Data

This section allows you to import data to the Maestro system in bulk. More details on this can be found in the Inputting Data section.

Widgets

Maestro gives you the ability to add a reporting widget to your website. This widget is customizable with year-to-date or all time numbers, icons, and basic styles.

You can copy the code and provide that to your web developer or add directly to your website.

Add Volunteer Hours

This tool allows you to add volunteer hours to the system in bulk. Simply type the contact(s) you want to add volunteer hours for, enter the total hours they volunteered, and the date. If there is an involvement you would select that and there is an optional notes section.

Note: you will enter the hours volunteered, not the total number of volunteer hours.
For example, if you had 10 people attend a meeting, you would enter their names and add 1 hour. Each of these people would then have 1 hour saved on their profile for that date, for a total of 10 hours. Entering 10 hours will save 10 hours to each person, resulting in 100 total hours.

Billing

If you have access to Billing, this will link you to the billing section where you can update payment methods and see Billing history.

User Access

This section will show you which users have access to your Maestro system, and their role.
Note: Access is given at the contact level, not in this section.

Donations

Prior to being able to utilize the donations section, you must first setup the donations settings.

Appeals

Adding appeals lets you track how you are asking for funds. Common appeals are in-person, direct mail, internet, etc.

Campaigns

Campaigns are the overall fundraising efforts your organization is undertaking, such as a capital campaign, annual fundraising drive, etc.

Funds

Funds are where you donations will go. This can be general operating, special funds, or any other location that you want to track.

Grants

Tracking the grants that the organization applies for and receives is an important element for downtown reporting. This section does not apply to grants that the organization is distributing, only those that you are applying for. If you want to track the grants that you distribute, we recommend utilizing Involvements.

Grants

For each Grant, you can enter the Name, Category, Description, Date of Application, Date of Award, Amount Requested, Amount Received, and a Note. The amount received will be reportable through the reporting based on the Date Awarded.

Grant Categories

We have added Grant Category so that you can organize all the grants you are managing. Once you have created the Grant Category you can assign Grants to those.

Involvements

Involvements

Involvements are Maestro’s tagging system. It may be helpful to think about Involvements as custom fields or tags. Involvements can be created for any attribute that the organization wants to

track. Involvements are the way to get data out of multiple spreadsheets and into one usable system to see each contact, business, or
property's complete engagement with the organization. Involvements can be added to any property, contact, work plan or business.

Involvement Categories

Having your involvement categories and your initial involvements created prior to loading data will make attaching those involvements much easier. It is important to have a planned naming structure for your involvements so that you can keep track of them down the road. Please see the section on involvements for specifics.

Community Investment

In the initial organization setup, you may want to add your Parks and Public Parking information which will be available in reporting. This can also be done at a later date if that information is not readily available when you do your setup.

Public Improvements

Public Improvements are the tangible improvements made in your downtown. Public infrastructure projects, etc.

In the Public Improvements, you have an option to check whether they are private dollars that were use. For example, if you have a mural project that cost $100,000 and 80% was funded with private dollars and 20% was funded with municipal dollars. This would be considered a public improvement because it is a public project.
You would enter this project twice:

4th Street Mural	$20,000.00 (Private Dollars)	06/12/2020
4th Street Mural	$80,000.00	06/12/2020

Public Investments

Public Investments are the income that your organization receives for operations (or to carry out projects such as cleanup projects, etc). A good rule of thumb is that tangible items are improvements and cash is investments.

Parks

Understanding the assets within your district mean that you need a place to input parks, including location and amenities.

Public Parking

This section allows you to add all of the public parking within your district. Within each public parking option, you can enter:

- Name (can be a public lot or Main Street)
- Location
- Coordinates
- Number of Public Spots (non hourly)
- Number of Hourly Spots
- Number of Accessible (ADA) Spots
- Number of leased spots

If this is on-street parking, make sure that you toggle the On Street Parking button to the on position.

Properties

Prior to inputting data, you will want to have this section complete so that you can use these fields to attach your incoming data.

Registries

Registries are any subset of your properties. They do not have to be contiguous. The most common registries are National Register of Historic Places, Local Landmarks, etc. You can also use these if your downtown has
geographic zones that you want to identify.

SSA/BID

Special Service Areas (SSAs) or Business Improvement Districts (BIDs) can be entered here. These districts may go by other names such as Community Improvement Districts, etc. Once you have added your SSA/BID name to this list those zones will be available to attach to properties within your Maestro account. You may create multiple SSAs/BIDs within your downtown, but you may only attach one SSA/BID to a property.

TIFs

TIFs, or Tax Increment Financing Districts are a common taxing tool for downtown organizations. Once you have added your TIF name(s) to this list those will be available to attach to properties within your Maestro account.
You may create multiple TIFs within your downtown, but you may only attach one to a property.

Zoning

This is where you would add your downtown’s zoning districts. Once you have added the zones here they will be available to attach to properties.

Involvements

Involvements are Maestro’s tagging system. It may be helpful to think about Involvements as custom fields or tags. Involvements can be created for any attribute that the organization wants to track. Involvements are the way to get data out of multiple spreadsheets and into one usable system to see each contact, business, or
property’s complete engagement with the organization. Involvements can be added to any property, contact, work plan or business.

Involvements	
Sponsorships	
Blues in the District Note Partner	2015
Blues in the District Note Partner	2021
Blues in the District Note Partner	2024
Blues in the District Note Partner	2014
Blues in the District Corporate Partner	2023
Blues in the District Concert Partner	2022
Volunteer	
Promotion Committee	2019
Organization Committee Chair	2024
Foundation Board	2020
Foundation Board	2019

This feature is used to track items such as:

- Board of Directors
- Committee Roles
- Sponsorships
- Awards
- Attendance, etc.

Important Note: Involvements are used to track important information that needs to be searched and does not have a designated field. For reference, review the full list of involvements and umbrella involvement categories in the Tools module.

Involvement Categories

Having your involvement categories and your initial involvements created prior to loading data will make attaching those involvements much easier. It is important to have a planned naming structure for your involvements so that you can keep track of them down the road. Please see the section on involvements for specifics.

Search & Reporting

Involvement names and data can be searched from the Search field and from the Advanced Reporting tool. However, the Involvement notes cannot be searched. The Involvement Data field is an open text field, so it can be used for dates as well as any other data a user wishes to search later.

Board Terms & Other Multi-Year Involvements

Some involvements require more detailed information, like dates and positions held. Typically, this issue is most related to boards of director positions (district boards, school boards, city council, etc.). In these cases, use the data field to designate the year or term end date. Use the notes field to designate the position held.

For instance, if a board member is serving a three year appointment, each year would be entered as its own involvement:

- Involvement Name: “Board of Directors”
  - Involvement Data: 2018
  - Involvement Notes:
- Involvement Name: “Board of Directors”
  - Involvement Data: 2019
  - Involvement Notes: Vice President
- Involvement Name: “Board of Directors”
  - Involvement Data: 2020
  - Involvement Notes: President

It is recommended that, at the start of a board member’s appointment or office term, all the related involvements (one for each year) be added. This avoids the likely scenario that the data will not be added annually in a timely manner. This process may require regular maintenance--for instance, if a member’s term ends prematurely or if a director is elected to an office position after his/her first year.

Dating Involvements

It is best practice to utilize the data field to include dates, as shown in the examples above.
A common exception to this would be memberships that use a rolling calendar. For example, if you have a membership campaign and someone can join in June and be a member through May of the following year. In this circumstance, we do advise dating your involvement.

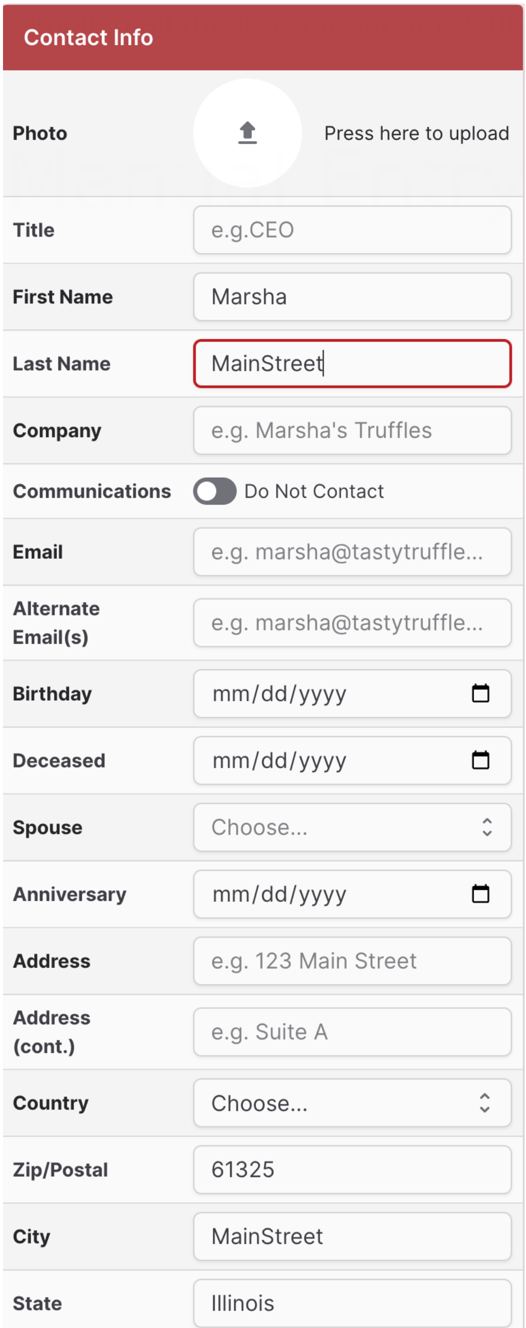
- Involvement Name: "2024/2025 Membership"

    - Involvement Data: June (or month they join)
    - Involvement Note:

This structure will allow you to generate reports for membership renewals quickly and easily.

Inputting Data

Prior to importing data, we recommend utilizing the Onboarding Checklist to make sure you have



Maestro system.

When entering data manually, it is a good idea to do a quick

search to ensure the data you are going to add doesn’t already exist. Remember, sometimes Mike is entered as Michael, etc.

1. Search Maestro for the contact, business, or property. If the data is not found in the system:
2. Select the appropriate module from the left pane.
3. Select the “+” icon in the upper right corner of the module window.
    1. Add a profile to the Contacts module for each person: the contact person, owner, manager, staff people, etc.
    2. Add a profile to the Business module for the business.
        1. Add a profile to the Contacts module for each person related to the business.
    3. Add a profile to the Properties module for each property (only in-district properties are tracked):
        1. Add a profile to the Contacts module for each person related to the property: the contact person, owner, manager, staff people, etc. (Typically, the only contact for a property is the property owner).
    4. In the profile that appears, fill in the fields for which data is available.
    5. Link the profile to other profiles by adding entries within the contacts, properties, or businesses cards of the current profile. To add information to a section, click on the “+” icon in its header bar).

Importing Data

We know that especially for new communities, getting the data into your Maestro system would be a massive undertaking without the ability to import data in large chunks, so we have built importers to help you load your data to the system. We encourage you to watch the video tutorial on how to import as well. Additionally, we recommend going through the Data Cleaning Checklist to ensure your data is formatted properly.

New data can be added via import, and existing data can be added-to or overwritten via import.

In order to ensure that all your connections are made upon import (Contacts to Businesses, Contacts/Business to Properties, etc), we suggest importing your files in the following order:

- Contacts
- Businesses
- Properties

You can remember this order by importing “top to bottom” in the order of the icons. It is important to note that while Maestro provides templates for data entry, for contacts, businesses, and properties they are not required and you can match your fields with any csv file.

For Work Plans we do suggest utilizing the template provided as there are limited number of fields available for import.

Controlling Duplicates on Import

The following information is critical to mitigating the number of duplicates and lost information. All of the following applies only to imported data.

Contacts

Maestro uses the email address as a contact's unique identifier, but it is not a Maestro-required field. If a contact is entered without an email address or with the wrong email address, Maestro will not be able to
identify it as a duplicate. So, even if that contact already existed in the system, it would be entered as a new contact.

For example, in the following case, Maestro will create a new profile for John Parker (because the email addresses are different):

- New Info: John Parker, jparker@parkerfoods.com, Parker Foods
- Existing Info in Maestro: John Parker, jparker@parkerfoods.com, Parker Foods

If the email address matches one that is already in the system, Maestro will overwrite old information with the new info and will add new data to fields that are not already populated.

For instance, in the following example, Mark would be overwritten by Marcus, and the mailing address would be added:

- New Info: Mark Jones mark@jones.com
- Existing Info in Maestro: Marcus Jones, mark@jones.com, 123 Main Street
- Result After Import: Marcus Jones, mark@jones.com, 123 Main Street

Businesses

Maestro uses the full business name as a Business' unique identifier. Without the business name exactly matching the one already in the system, Maestro will create a separate record for that business. This is why it is important that prior to importing your data that you run a "trim" function in your database to prevent any extra spacing, etc.

When the business name does match an existing business, Maestro will overwrite existing information and add new information that does not already exist.

Currently, when importing businesses with the primary contact information, only the name (no an email address) is needed to relate that primary contact to his/her existing Contact profile.

Physical vs. Mailing Address
When importing businesses, Maestro's template contains two different sets of address fields:

- Physical Address: This address is the property address. If a property already exists with this address, Maestro will automatically relate that property to the imported business.
- In order to maintain accurate data reporting, only businesses with a physical address IN your district should have their physical address imported. For businesses outside your district, you should use the mailing address fields.
- Mailing Address: This address populates the "Mailing Address" fields on the Business' "Business Info" card within the profile. The addresses can be the same or different.

Properties

Maestro uses the full address (number, street, city, state, and ZIP) as a Property's unique identifier. Without every one of those data elements, Maestro will identify the imported properties as new, creating separate records for them.

This unique identifier is case specific. For example, 123 Main Street and 123 Main St will be treated as different properties within the system.

When the address does match an existing property, Maestro will overwrite existing information and add new information that does not already exist.

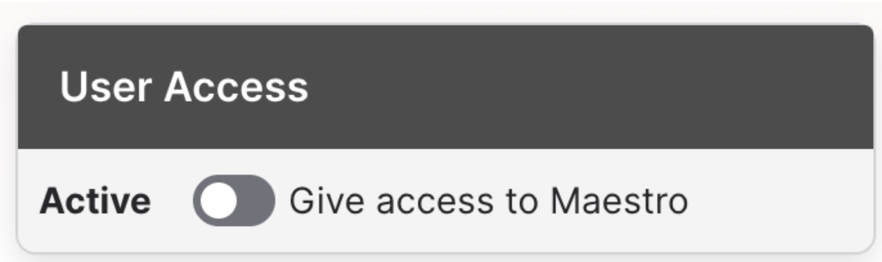
Currently, when importing properties with property owner information, only the name (not an email address) is used to relate the property owner to his/her existing Contact profile.

When importing Properties, you can connect the property to the appropriate owner by having the owner identified in your spreadsheet (remember to look for unique identifiers). For each property (row in your spreadsheet) you will need to identify which are a Contact and which are a Business.

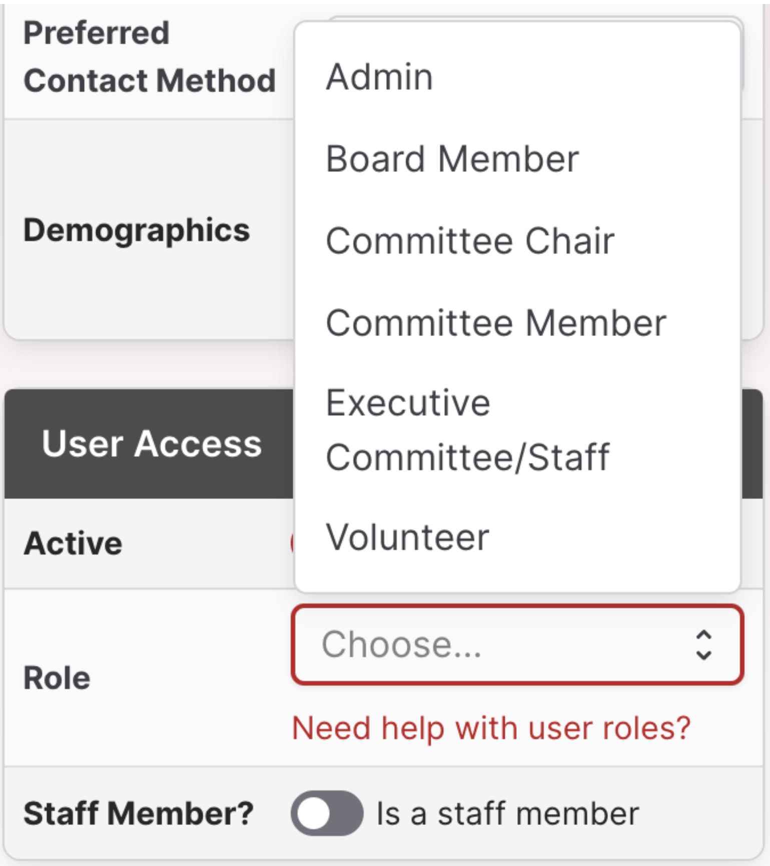
Adding Users

Once a contact is in your Maestro system with a valid (working) email address, you will be able to grant them access.

To provide access, edit their profile, then click the “Give Access to Maestro” checkbox in the User Access section.



Select their role (use the User Tiers chart to determine the appropriate role) and check the box if they are a staff member.



*Remember, user roles are not determined by the person’s role in your organization but rather what level of access is required for them in your system.

If you have questions about what each role includes, refer to the User Tiers Chart.

Save their profile and that user will be emailed notifying them that they have been granted access to your system and asking them to create a password.