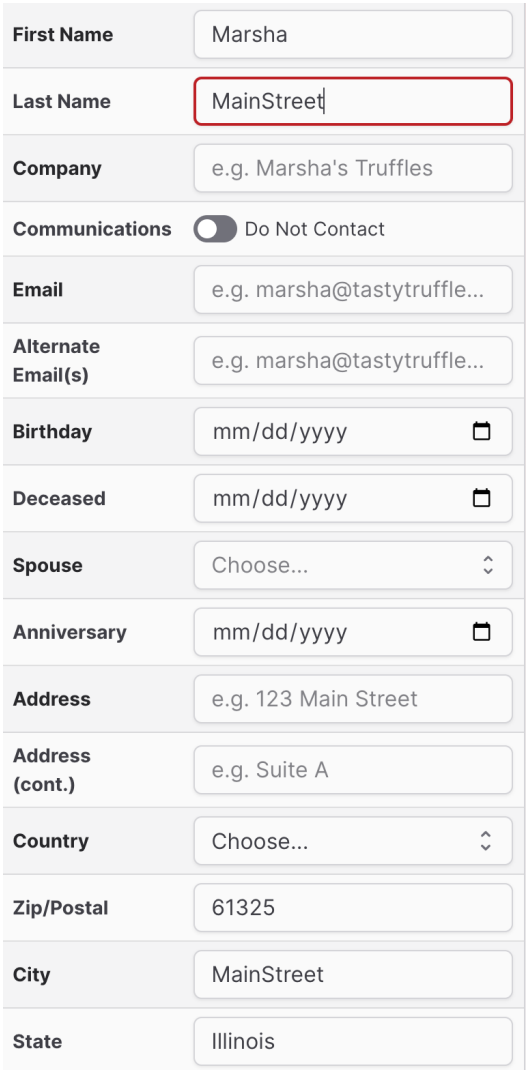
Inputting Data

Prior to importing data, we recommend utilizing the Onboarding Checklist to make sure you have compiled all the information for your Maestro system.

Manual Entry



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.

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