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.

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