

Contact Profiles

To add a contact profile, go into the Contacts section of Maestro and click on the Plus button in the upper right hand corner. This will create a blank profile for you to edit and save.

The screenshot displays the Maestro software interface for a contact profile. The profile is for Travis Brown, Chief Business Development Officer at The Relish Jar. The interface is organized into several sections:

- Profile Information:** Name, title, company, email, alternate email, phone numbers, birthday, spouse, anniversary, address, and demographics.
- Communications:** Status set to "Okay to Contact".
- User Access:** Travis has access to Maestro. Role is Admin. Staff Member? Yes.
- Tasks:** A list of tasks with due dates, including "Send letter to Businesses in the Area" (06/01/2023), "Recycling/Trash Totes Ordered" (12/20/2023), "Security Confirmed" (04/19/2024), "Restrooms Ordered" (05/23/2024), "Clean-up Crew Secured" (05/24/2024), "Concert Setup" (07/26/2024), and "Send Reminders".
- Notes:** "Former Executive Director" and "More Notes Here and here".
- Contact Reports:** "Editing this contact Report" (edited 03/29/2024), "Contact Report Testing" (edited 03/28/2024), "Met with Travis to discuss their business retention program" (06/30/2021), and "Talked to Travis about being a part of the Farmers Market Committee" (edited 11/11/2020).
- Involvements:** "Award" (Bob Mays Volunteer of the Year Award Recipient, 2019), "Events" (Farmers Market Vendor 5/7, 5/4, 2020; Blues Food Sponsor, 2024; Annual Meeting Attendee, 2019), and "Sponsorships" (Teal Pumpkin Event Sponsor, 2019; Pumpkin Patch Partnership, 2021; Light the Park & The District Title Sponsor, 2018; Feast Friend, 2023; Feast Farmers Table Partner, 2019; Feast Chef's Table Partner, 2021; Farmers' Market Presenting Partner, 2024; Farmers' Market Market Sponsor, 2020; Farmers' Market Market Friend, 2023).
- Work Plans:** 5 of 16 items listed, including "2020 Blues in The District" (06/12/2020), "2020 Membership Campaign" (04/14/2020), "2020 Street Dance" (08/15/2020), "2021 Street Dance" (10/16/2021), and "2021 Blues in The District" (06/11/2021).
- Volunteer Hours:** 5 of 188 hours listed, including "Quick Add" entries for 04/11/2024, 04/03/2024, and 03/29/2024.
- Properties:** 4 properties listed with addresses and roles (Owner, Staff, Manager).
- Properties Owned:** 1 property listed at 600 Hampshire Street, Quincy, Illinois 62301.
- Donations:** 5 of 11 donations listed, including "01/23/2019" for \$100.00.

Required Fields

Individual's First Name or Company Name

All contact profiles must have an individual's first name or a company name to be saved.

Initially, the profile template will show both fields with an asterisk, but, after data is entered into one of those fields, the other asterisk will disappear.

Title Field

This field is used both for a traditional "title" (e.g. Mayor, Judge, Dr., The Honorable, religious titles, etc.)

as well as the contact's job title/ position (e.g. teacher, engineer, director of development, etc.).

Large Institution Naming

Protocol (Suggestion/Tip)

Do not include department names in a contact's title. Instead, add the department name to the name of the company field. This ensures the department name is searchable--which is critical for larger companies with many staff and multiple departments, like the City of Smallville.

Use: COMPANY NAME, DEPARTMENT/DIVISION NAME

For instance: City of Smallville, Law Department

Company or Involvement? (Suggestion/Tip)

Contact profiles include a "Company" field. For individual contacts, this field is reserved for the individual's employer. If the contact is a neighborhood association member, board member, etc., those roles should be recorded as "Involvements". (More information on involvements in the "Involvements" section below).

For instance, a member of the Smallville Historical Commission is employed by Marriott Hotels. In that case, the contact's "Company" is Marriott Hotels, and one of his "Involvements" is the Smallville Historical Commission.

Address Fields

Maestro allows for one postal address only, so use the address that relates that contact to the organization.

For instance, if the contact lives outside the city but owns a business in the city, use the business address.

If the contact is both a resident and business owner in the city, use your best judgment: Where would this contact like to receive mail from the organization? In what capacity (personal or business) has the contact interacted with the organization?

When to add an Organization vs. a Contact

The majority of the time, we strongly recommend adding individuals in the contacts section and organizations and businesses in the business section.

The one main exception to this rule is when you need to track volunteer hours for a group where the individuals may change from year to year or event to event, like a fraternity or sorority. Since that may be the individual's only interaction with your organization, we don't suggest putting each person into your Maestro system, but instead adding a profile for Delta Delta Delta and then attaching volunteer hours to that profile.

Contact Relationships

Within each profile, Maestro links staff, owners, and managers to their corresponding businesses and properties and vice versa. In addition, Maestro links businesses to their corresponding properties and vice versa.

Currently, profiles within the same module cannot relate to each other, but profiles from different modules can.

2+ Individuals : 1 Organization

- Contact Profile 1 (CP1)
 - Name: Karen Nigosian
 - Company Name: Nigosian Rug Company
- Contact Profile 2 (CP2)
 - Name: George Nigosian
 - Company Name: Nigosian Rug Company
- Business Profile 1 (BP1)
 - Business Name: Nigosian Rug Company

1 Individual : 2+ Organizations

- CP1
 - Name: Rafi Rayes
 - Company Name: Alano's / T-Mobile
- BP1
 - Business Name: Alano's Pizza & Subs
- BP2
 - Business Name: T-Mobile

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