

# 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.

Organization   Economic Vitality   Promotion   Design

Search...   K

### Contacts

Travis Brown

**Travis Brown**  
 Chief Business Development Officer  
 The Relish Jar

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**Communications**   Okay to Contact

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**Email**   travis@therelishjar.com

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**Alternate Email(s)**   travis@maestrocm.com

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**Phone**   Work 217-391-6094  
Cell 217-555-5555 (Preferred)

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**Birthday**   12/11/1977 (46 years)

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**Spouse**   Jennifer Brown

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**Anniversary**   06/23/2001 (22 years)

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**Address**   3323 Tiger Trail  
Quincy, Illinois 62301

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**Demographics**   Veteran

**User Access**

✔
Travis has access to Maestro.

<b>Role</b>	Admin
<b>Staff Member?</b>	Yes

**Properties** All

Address	Role
114 North 7th Street Quincy, Illinois 62301	Owner
327 South 8th Street Quincy, Illinois 62301	Staff
905 York Street Quincy, Illinois 62301	Manager
1009 State Street Quincy, Illinois 62301	Manager

**Properties Owned** All

Address	
600 Hampshire Street Quincy, Illinois 62301	

**Tasks**

Task	Due
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
Send Reminders	

**Work Plans** 5 of 16 >

Name	Date
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
2021 Blues In The District	06/11/2021

**Volunteer Hours** 5 of 188 >

Entry	Hours	Date
Quick Add	1	04/11/2024
Quick Add	1	04/11/2024
Quick Add	1	04/03/2024
Quick Add	1	04/03/2024
Quick Add	1	03/29/2024

**Donations** 5 of 11 >

Donation Date	Amount
01/23/2019	\$100.00

**Notes**

Former Executive Director

More Notes Here

and here

**Contact Reports**

Editing this contact Report

— edited 03/29/2024 (added by Travis Brown)

Contact Report Testing

— edited 03/28/2024 (added by Travis Brown)

Met with Travis to discuss their business retention program

— 06/30/2021 (added by Travis Brown)

Talked to Travis about being a part of the Farmers Market Committee

— edited 11/11/2020 (added by Travis Brown)

**Involvements**

**Award**

Bob Mays Volunteer of the Year Award Recipient	2019
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**Events**

Farmers Market Vendor 5/7, 5/14	2020
Blues Food Sponsor	2024
Annual Meeting Attendee	2019

**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

## 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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Revision #4

Created 19 April 2024 19:36:00

Updated 19 April 2024 20:41:15