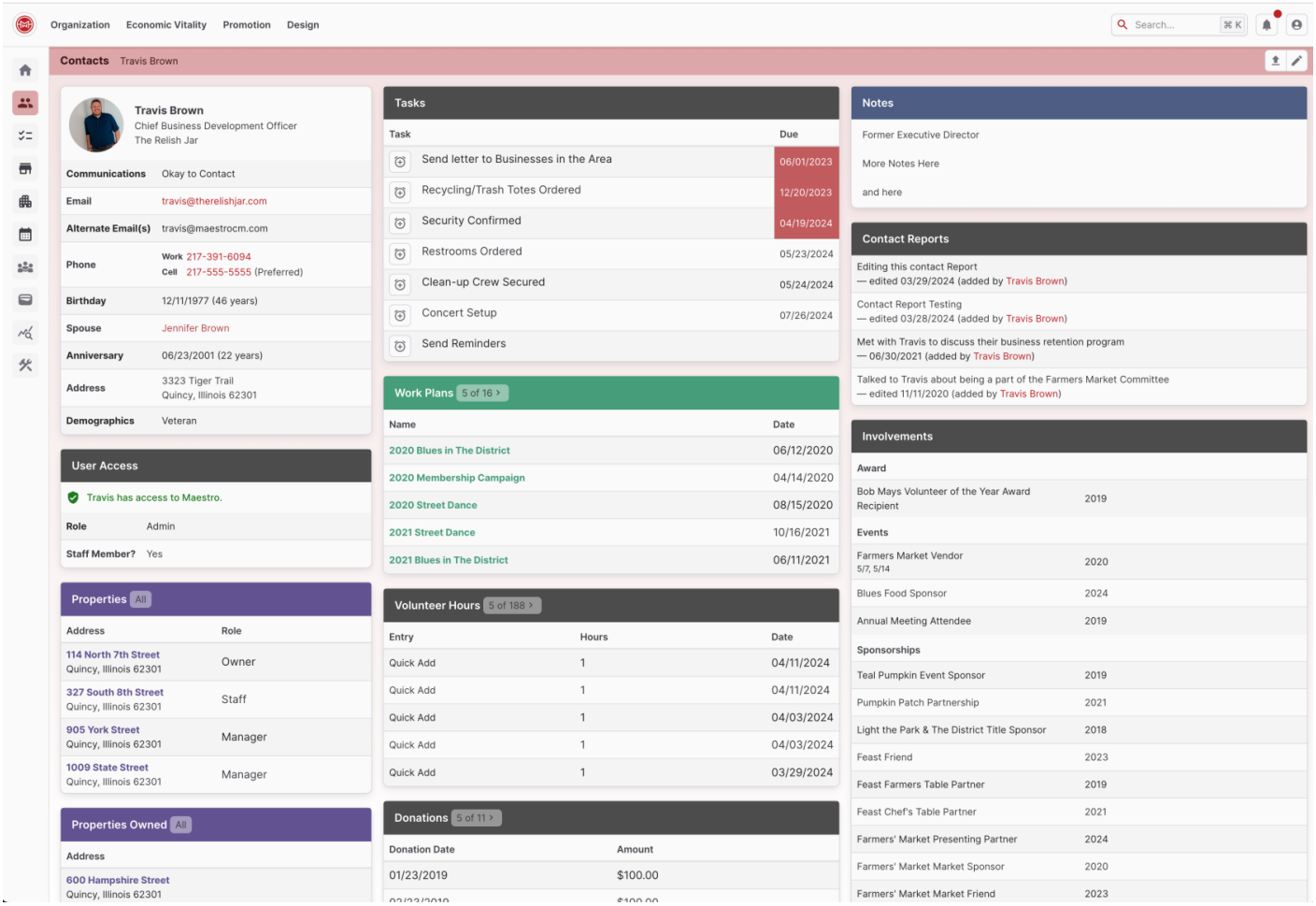
Contact Profiles

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.



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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