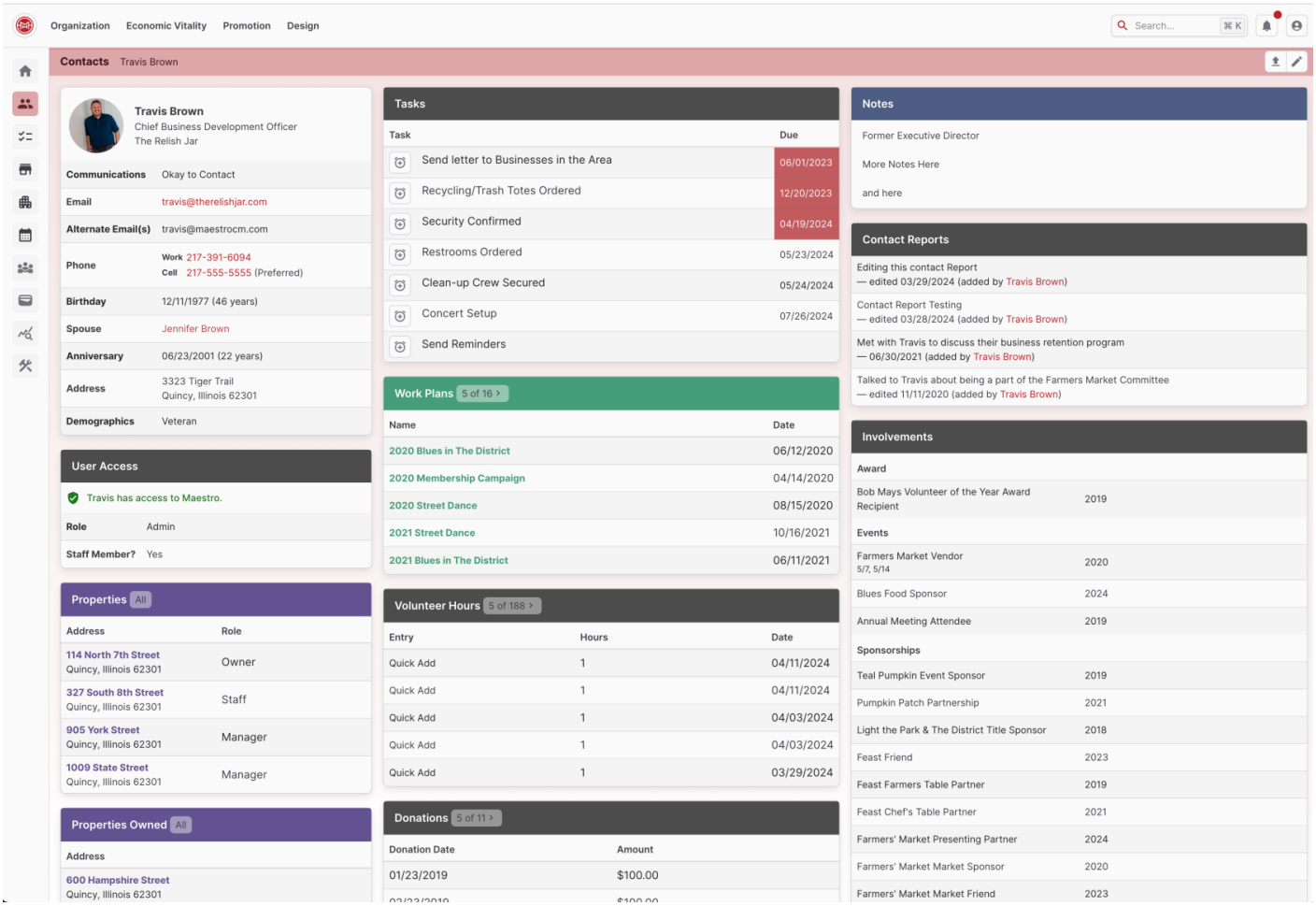
1.04 Businesses

- Business Profiles
- Involvements

Business Profiles

To add a contact profile, go into the Businesses 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 Field

Company Name
All Business profiles must have a company name to be saved. The full Company Name is the unique identifier for businesses and will determine if imports update the record or create a new record.

The Business Profile contains a number of optional default fields that data can be added to (via import or manual entry). Some of the most important for reporting purposes are:

- In District (checking this box will include the business in your reporting statistics)
- Opened Date (allows you to have new businesses calculated correctly)
- Closed Date (for businesses who have closed)

- Relocated Out Date (for businesses who remain in operation but are now outside the district)
- Employees (Full Time, Part Time, Seasonal)

Property Address

Only businesses within your geographic service area (district) should be connected to a property. Other businesses should utilize the Mailing Address section.

Businesses within your service area that have an alternate mailing address (PO Box, etc) should also utilize the Mailing Address section.

Involvements

Involvements are Maestro’s tagging system. It may be helpful to think about Involvements as custom fields or tags. Involvements can be created for any attribute that the organization wants to track. Involvements are the way to get data out of multiple spreadsheets and into one usable system to see each contact, business, or
property’s complete engagement with the organization. Involvements can be added to any property, contact, work plan or business.

Involvements	
Sponsorships	
Blues in the District Note Partner	2015
Blues in the District Note Partner	2021
Blues in the District Note Partner	2024
Blues in the District Note Partner	2014
Blues in the District Corporate Partner	2023
Blues in the District Concert Partner	2022
Volunteer	
Promotion Committee	2019
Organization Committee Chair	2024
Foundation Board	2020
Foundation Board	2019

This feature is used to track items such as:

- Board of Directors
- Committee Roles
- Sponsorships
- Awards
- Attendance, etc.

Important Note: Involvements are used to track important information that needs to be searched and does not have a designated field. For reference, review the full list of involvements and umbrella involvement categories in the Tools module.

Involvement Categories

Having your involvement categories and your initial involvements created prior to loading data will make attaching those involvements much easier. It is important to have a planned naming structure for your involvements so that you can keep track of them down the road. Please see the section on involvements for specifics.

Search & Reporting

Involvement names and data can be searched from the Search field and from the Advanced Reporting tool. However, the Involvement notes cannot be searched. The Involvement Data field is an open text field, so it can be used for dates as well as any other data a user wishes to search later.

Board Terms & Other Multi-Year Involvements

Some involvements require more detailed information, like dates and positions held. Typically, this issue is most related to boards of director positions (district boards, school boards, city council, etc.). In these cases, use the data field to designate the year or term end date. Use the notes field to designate the position held.

For instance, if a board member is serving a three year appointment, each year would be entered as its own involvement:

- Involvement Name: “Board of Directors”
  - Involvement Data: 2018
  - Involvement Notes:
- Involvement Name: “Board of Directors”
  - Involvement Data: 2019
  - Involvement Notes: Vice President
- Involvement Name: “Board of Directors”
  - Involvement Data: 2020
  - Involvement Notes: President

It is recommended that, at the start of a board member’s appointment or office term, all the related involvements (one for each year) be added. This avoids the likely scenario that the data will not be added annually in a timely manner. This process may require regular maintenance--for instance, if a member’s term ends prematurely or if a director is elected to an office position after his/her first year.

Dating Involvements

It is best practice to utilize the data field to include dates, as shown in the examples above.
A common exception to this would be memberships that use a rolling calendar. For example, if you have a membership campaign and someone can join in June and be a member through May of the following year. In this circumstance, we do advise dating your involvement.

- Involvement Name: "2024/2025 Membership"

- Involvement Data: June (or month they join)
- Involvement Note:

This structure will allow you to generate reports for membership renewals quickly and easily.