

# 1.04 Businesses

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# 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.

**Organization** Economic Vitality Promotion Design

Search... K [Notifications] [Profile]

### Contacts Travis Brown

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

**Communications** Okay to Contact

**Email** [travis@therelishjar.com](mailto:travis@therelishjar.com)

**Alternate Email(s)** [travis@maestrocm.com](mailto:travis@maestrocm.com)

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

**Birthdate** 12/11/1977 (46 years)

**Spouse** Jennifer Brown

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

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

**Demographics** Veteran

**User Access**

Travis has access to Maestro.

**Role** Admin

**Staff Member?** 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
03/23/2019	\$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 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.