

# 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.

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, email (travis@therelishjar.com), alternate email (travis@maestrocm.com), phone numbers, birthday (12/11/1977), spouse (Jennifer Brown), anniversary (06/23/2001), address (3323 Tiger Trail, Quincy, Illinois 62301), and demographics (Veteran).
- Communications:** Status is "Okay to Contact".
- User Access:** Travis has access to Maestro. Role is Admin. Staff Member? Yes.
- Properties:** Lists four properties with addresses and roles (Owner, Staff, Manager).
- Properties Owned:** Lists one property at 600 Hampshire Street, Quincy, Illinois 62301.
- Tasks:** A list of tasks with due dates: "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".
- Work Plans:** A list of work plans with dates: "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:** A list of volunteer hours with dates: "Quick Add" (04/11/2024), "Quick Add" (04/11/2024), "Quick Add" (04/03/2024), "Quick Add" (04/03/2024), and "Quick Add" (03/29/2024).
- Donations:** A list of donations with dates and amounts: "01/23/2019" (\$100.00) and "03/23/2019" (\$100.00).
- Notes:** "Former Executive Director", "More Notes Here", and "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).

## 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.

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