1.10 Reporting

- Reinvestment Reporting
- List Generation

Reinvestment Reporting

Being able to report your success is vital for an organization. The reporting in Maestro is your reinvestment statistics and the information that you would likely share in an annual report, with a city council or your coordinating program.

When you enter reporting you are given the option to select a previously saved report, one of our preset Quick Reports, or run a New Report. Clicking on any of these will generate the reporting interface.

To generate a reinvestment report, you will select your date range and whether or not you would like to display the statistics only. Leaving this off will provide you with the details of the report as well. In the "Include Reinvestment Statistics?" box you will select the items you want to include in the report. You can select certain items such as New Businesses and Closed Businesses or you can select all. Once you have selected the elements you want to include, you will hit the green "run report" button and the report will be instantly generated.

Once the report has run you will see the data. You will also have the opportunity to download the report as a PDF or name the report and Save it so that you can access it from the Saved Reports.

In our reporting, we also have the ability to add filters to this report. Between the "Global Options" and "Include Reinvestment Statistics" boxes you have the option to add a search filter. When you select this you can setup filters for your report based on any field in the system. When looking at reinvestment statistics, the most
common filters will be Properties. For example, if you wanted to run a report for All businesses that have opened this year on Main Street, you would add a filter, select Properties and then Address > Contains > Main and run your report. The report will now be filtered to only properties on Main Street.

When you add a Filter you will also have a new box to include filtered objects. With our previous example, the reinvestment report will run and be filtered by properties.

The report will also give you a list of all properties that match those parameters. If you selected to include Contacts and/or Businesses in your Filtered Objects, it would also generate a list of every contact associated with a property in that search, as well as every business associated with that search.

When you are including filters, you also have the ability to download the lists as a csv file. You can also run these searches without the reinvestment reports. This functionality allows you to search and filter everything in your Maestro system.

This is the section where you can use every field in Maestro, including the Involvements (custom fields) to compile the information that you are looking for, such as your list of sponsors or property
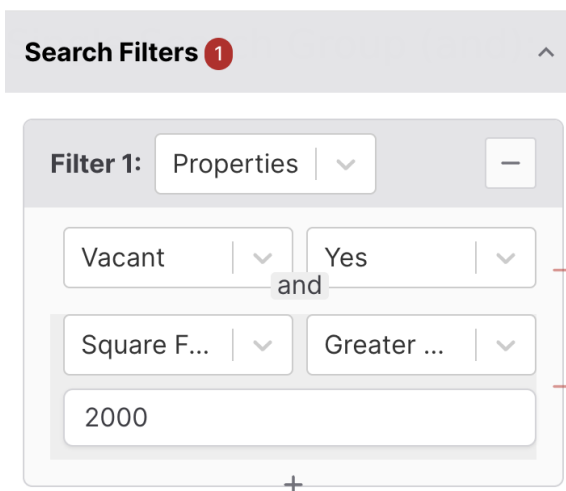
owners.

Saving Reports

After running a new report you can save the search. In Reinvestment Reporting this will save the results that you can access later.

List Generation

When you are including filters, you also have the ability to download the lists as a csv file. This functionality allows you to search and filter everything in your Maestro system.

This is the section where you can use every field in Maestro, including the Involvements (custom fields) to compile the information that you are looking for, such as your list of sponsors or property owners.

To search for results that include both Criteria A and

Criteria B, use a single search group.
For instance, in Search 1:
Properties Vacant Yes + Square Footage Greater Than 2000.

This search will return only those properties that are vacant AND have a square footage greater than 2000.

Multiple Search Groups (or):

To search for results that include Criteria A or Criteria B, use multiple search groups.
Important Note: These searches may result in duplicate names in your search results. To deduplicate, you will have to export to Excel, and use its formulas/functionality to deduplicate the list.

For instance

In Search 1: Contacts # of Properties Greater Than 2
In Search 2: Businesses Business Type Shopping & Retail Trade

This search will return all contacts related to two or more properties OR any business with a recorded business type of retail trade.

For more complicated searches, try some combination of the above filters.

Filtered Objects

When you add a Filter you will also have a new box to include filtered objects.

If you selected to include Contacts and/or Businesses in your Filtered Objects, those will be included in your results. For example, if you searched for properties on Main Street and included all businesses, it would return a list of all properties on Main and all businesses associated with those properties.

Vacant Properties vs. Vacant Units

Maestro allows filtering on properties with "Vacant Units" and on properties that are "Vacant". A custom report has been created that returns all vacancies (units and properties).

- Vacant Units: Any unit within a property that is commercial and does not have a business related/linked to it is considered a vacant unit.
- Vacant Property: Any property that does not have units and does not have any businesses related/linked to it.

Saving Reports

After running a new report you can save a search. When using filtering for list generation, saving the search will save the search parameters that you can access again later through Saved Reports.