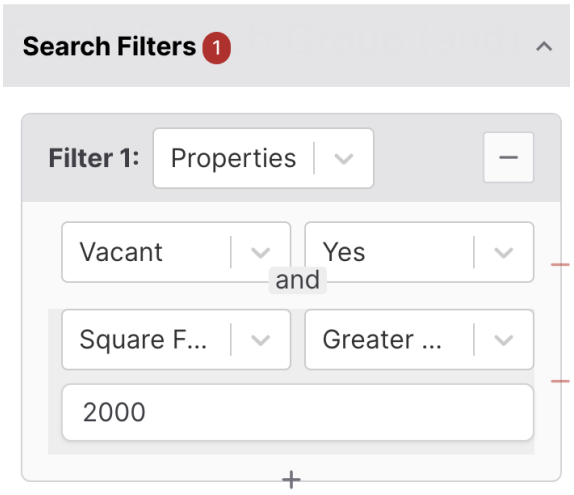
List Generation

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.

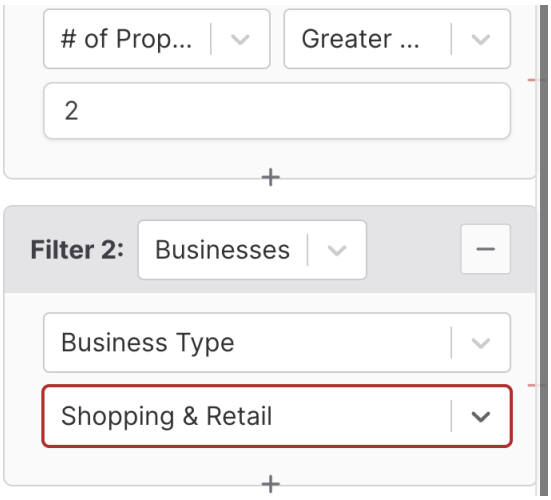


To search for results that include both Criteria A and Criteria B, use a single search group.
For instance, in Search 1:
Properties Vacant Yes + Square Footage Greater Than 2000.

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.

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