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.

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