



# Creating and Updating a Contact List in Maestro

# Creating a List You Can Update in Maestro

This guide will walk you through creating a simple, single contact list in Maestro that you can use to manage your subscribers. This guide assumes that you will be uploading new subscribers either through a CSV file, or by manually adding single subscribers to your list.

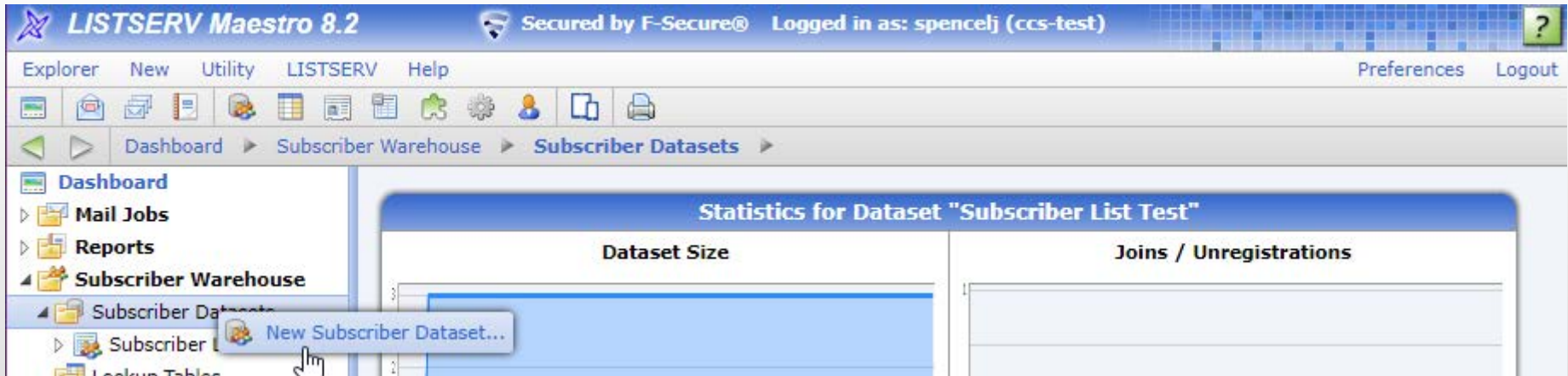
If you wish to create a subscriber list that connects to an LDAP or Active Directory system, please contact [IThelp@uoguelph.ca](mailto:IThelp@uoguelph.ca) and CCS can help you set this up!

# Instructions for Creating and Updating

- [Click Here](#) if you are looking to create a new list in Maestro
- [Click Here](#) if you are looking to update an existing contact list in Maestro

# Creating a New List

In Maestro, contact lists for email campaigns are stored under the **Subscriber Warehouse**, in the **Subscriber Datasets** folder. Right-click on **Subscriber Datasets** and you will see the option to create a **New Subscriber Dataset...**



# General Settings

The first step in creating a new contact list is to give the list a **Name**, specify the **List Administrator**, and give the list an **Internal Description**. You can ignore the other fields on this first page. Click **Next** when you are done to advance to the next step.

The screenshot shows a web interface for creating a new contact list. At the top, there are four tabs: [General](#), [Profile Fields](#), [Profile Field Details](#), and [Summary](#). Below the tabs are four buttons: [Cancel](#), [Save & Exit](#), [<- Back](#), and [Next ->](#). The main content area is titled **General** and contains the following instructions: "Fill in the general information about the dataset. The list administrator email address must be an authentic address that subscribers can mail to." Below the instructions are four input fields: "Name:" with the value "Newsletter List"; "List Administrator: (Email address)" with the value "ITHelp@uoguelph.ca"; "Internal Description:" with the value "For our weekly newsletter"; and "Public Description: (Optional)" which is currently empty. At the bottom of the form, there is a toolbar with several icons and a table with one row containing the number "1".

# Profile Fields

Step two is to specify the fields you would like to include in your contact list. **Email** is the default field, but you can also add fields for First and Last Name, Organization, Group, or anything else you wish to include when uploading your list. Click **Add Field** to create new data fields in your list. When you are done, click **Next**.

The screenshot shows a web interface for configuring profile fields. At the top, there are four tabs: "General", "Profile Fields" (which is selected), "Profile Field Details", and "Summary". Below the tabs are two buttons: "Cancel" and "Save & Exit". On the right side, there are two navigation buttons: "<- Back" and "Next ->". The main content area is titled "Shared Dataset Fields" and contains the following text: "Profile fields available for the subscriber dataset (and as shared fields for all lists in the dataset). Specify the shared dataset fields. These fields are shared among all subscriber lists in this dataset. Click 'Add Field' to add a new field to the list. Click on the links next to a field to select it for editing or to remove the field from the list." Below this text is a table with the following data:

Name	Display Name	Data Type	Input Type
EMAIL	<a href="#">Email Address</a>	Text	Mandatory

Below the table is a link labeled "Add Field".

# Profile Field Details

If you feel that the data fields you have added may be confusing for other people in your organization, you can also add a description for the field. Click **Next** when you are finished to advance to the last step.

The screenshot shows a web interface for configuring profile fields. At the top, there is a navigation bar with four tabs: 'General', 'Profile Fields', 'Profile Field Details' (which is selected and highlighted), and 'Summary'. Below the navigation bar are four buttons: 'Cancel', 'Save & Exit', '<- Back', and 'Next ->'. The main content area is titled 'Profile Field Details' and contains the following text: 'Specify the details for the profile fields.' and 'The list below displays all dataset fields. You may define descriptions for all fields. These descriptions can be used to explain the field content and usage on the subscriber pages where the display name is not meaningful enough for the subscriber.' Below this text is a table with two columns: 'Field' and 'Description'. The table has one row with the field name 'EMAIL' and the description '<no field description defined>'. To the right of the description is an 'Edit' link.

Field	Description
EMAIL	<no field description defined> <a href="#">Edit</a>

# Summary

When you are finished, you will see a summary of the list you have created. You can ignore the Public Subscriber Area Access unless you wish to make the list public. Click **Finish** to complete the list creation.

Cancel Save & Exit <- Back Finish

**Summary**

This page summarizes the settings of the dataset.  
Set the subscriber area access level and then click Finish to accept the changes. Click Cancel to exit without saving your changes.

**Public Subscriber Area Access**

No public access ▼

Closed for maintenance

**General Settings**

Dataset Name: Newsletter List

Dataset Description: For our weekly newsletter

Access Pages Language: English (Default)

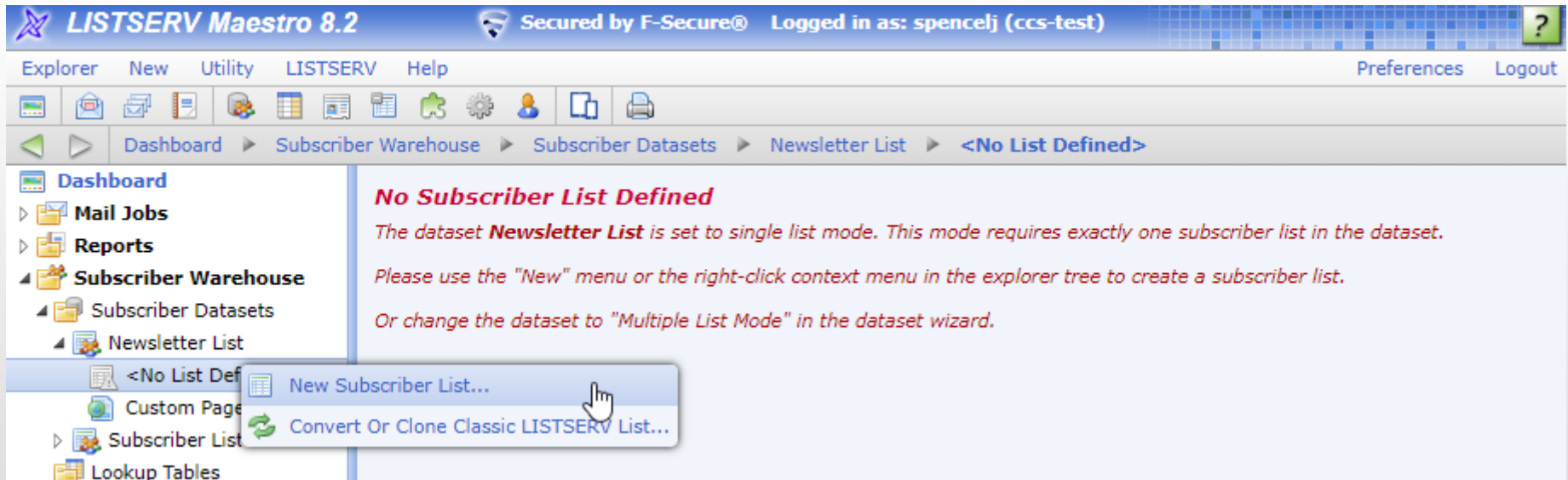
**Profile Fields**

Name	Display Name	Data Type	Input Type
EMAIL	Email Address	Text	Mandatory (shared field)



# Creating a New Contact List

Contact lists are where your individual contacts are stored. For this example, we will only create one subscriber list in our Dataset. To create a contact list, right-click on **<No List Defined>** and select **New Subscriber List...**



# General

The first step in creating a new contact list is to give it a name and a description. For this example, we will use the same name and description as the dataset, as we will only have one contact list. Click **Next** when you are finished.

Cancel Save & Exit <- Back Next ->

**General**

Specify the name and the description of the subscriber list.

Name: Newsletter List

Internal Description: For our weekly newsletter

Public Description: (Optional)

1
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External Download: Download security token not available until list creation is completed.

[Show Advanced Settings](#)

# Profile Fields

Like datasets, Maestro allows you to specify custom profile fields for your contact list as well. These are inherited from the Dataset, so you should not need to change anything here. Click **Next** to continue.

Cancel Save & Exit <- Back Next ->

**Profile Fields**

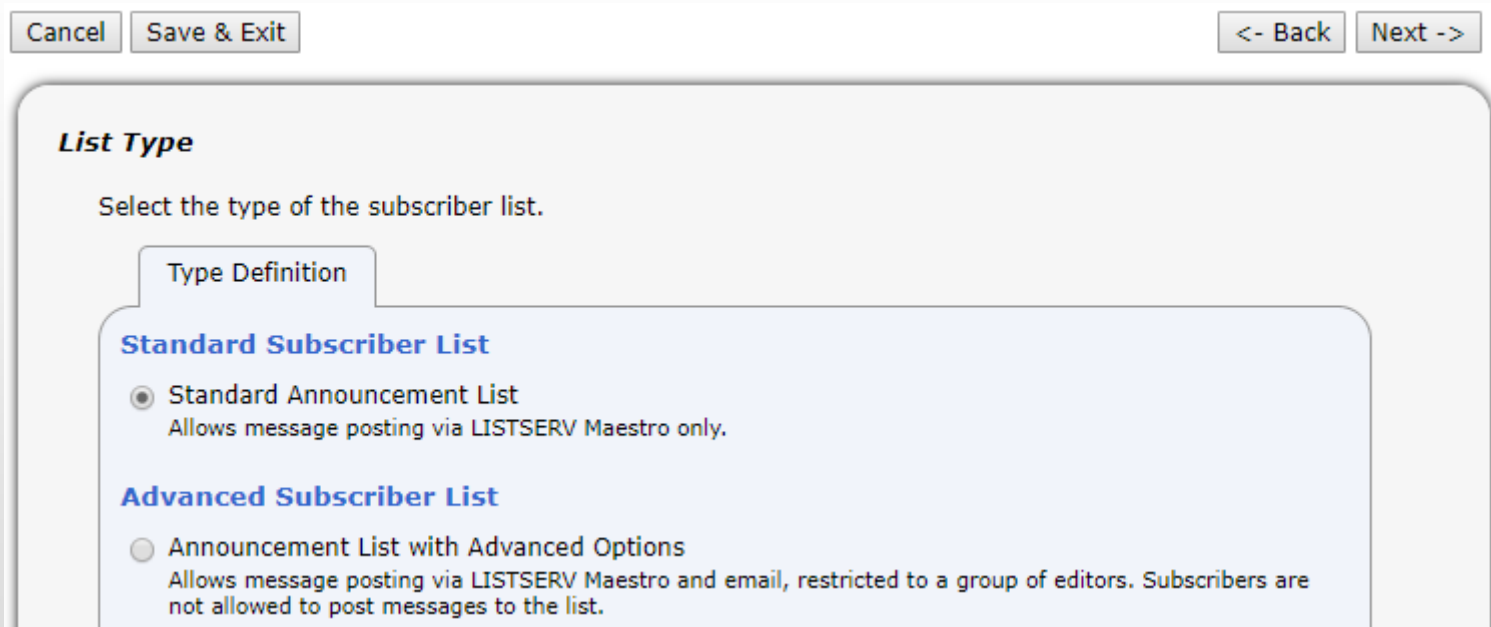
Profile fields available for the subscriber list.

The list below displays the shared fields of the dataset together with the profile fields of the subscriber list.  
Click **Add Field** to add a new field to the list. Click on the links next to a list field to select it for editing or to remove the field from the list.

Name	Display Name	Data Type	Input Type	
EMAIL	Email Address	Text	Mandatory	(shared field)
<a href="#">Add Field</a>				

# List Type

There are several different List Types in Maestro, each with their own description. We recommend using the **Standard Subscriber List**, as this ensures your list is only accessible via Maestro. Click Next when you are finished to advance to the last step.

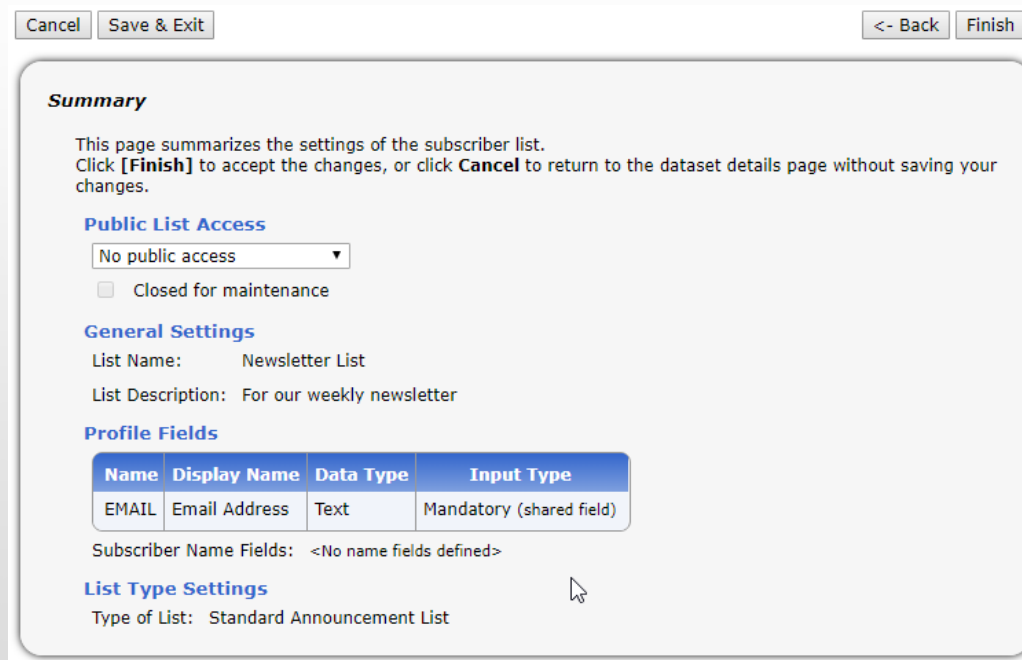


The screenshot shows a web interface for configuring a list type. At the top, there are four buttons: 'Cancel', 'Save & Exit', '<- Back', and 'Next ->'. The main content area is titled 'List Type' and contains the instruction 'Select the type of the subscriber list.' Below this, there is a 'Type Definition' tab. Under the tab, there are two options:

- Standard Subscriber List**
  - Standard Announcement List  
Allows message posting via LISTSERV Maestro only.
- Advanced Subscriber List**
  - Announcement List with Advanced Options  
Allows message posting via LISTSERV Maestro and email, restricted to a group of editors. Subscribers are not allowed to post messages to the list.

# Creating a New Contact List

If you have selected a Standard Announcement List, there will be no further options and you will be taken to a summary of your list settings. Click **Finish** to create the list and start uploading your contacts!



Cancel Save & Exit <- Back Finish

**Summary**

This page summarizes the settings of the subscriber list.  
Click [**Finish**] to accept the changes, or click **Cancel** to return to the dataset details page without saving your changes.

**Public List Access**

No public access ▾

Closed for maintenance

**General Settings**

List Name: Newsletter List

List Description: For our weekly newsletter

**Profile Fields**

Name	Display Name	Data Type	Input Type
EMAIL	Email Address	Text	Mandatory (shared field)

Subscriber Name Fields: <No name fields defined>

**List Type Settings**

Type of List: Standard Announcement List

# Uploading Contacts to a Contact List

This guide assumes that you will be uploading contacts through a CSV file or adding them manually to your list one at a time. If you are looking to import contacts from LDAP or Active Directory, please contact [ITHelp@uoguelph.ca](mailto:ITHelp@uoguelph.ca), and CCS will assist with this process.

# Uploading Contacts from a CSV File

To get started, right-click on your **Contact List**, navigate to **Subscriber Import**, and select **Import Subscribers Now...**

The screenshot displays the LISTSERV Maestro 8.2 web interface. The top navigation bar includes 'Explorer', 'New', 'Edit', 'Utility', 'LISTSERV', and 'Help'. The breadcrumb trail shows the path: Dashboard > Subscriber Warehouse > Subscriber Datasets > Newsletter List > Newsletter List. The main content area is titled 'Test List' and features three summary cards: 'List Size' (0 Now, +0 Last 24hrs, +0 Last Week), 'Last Week' (+0 Subscribes, -0 Unsubscribes, -0 Cleanups), and 'History' (+0 Subscribes, -0 Unsubscribes, -0 Cleanups). A context menu is open over the 'Subscriber Import' option in the left sidebar, with 'Import Subscribers Now...' selected. The interface also shows a 'Subscriber Warehouse' sidebar and a 'Test List' table at the bottom.

# Modification Type

First you will need to specify how you want to update the list – there are several options, each with descriptions. For this example we will choose a **Full Synchronization**. Click **Next** once you have made your choice!

## *Modification Type*

The imported data can be used to modify the subscribers of the list (including the values for shared dataset fields) or delete a set of subscribers from the list.

- Add to List**  
Adds new subscribers found in the imported data to the list. Leaves all existing list subscribers unchanged.
- Update in List**  
Updates existing list subscribers with the values found in the imported data. Does not add any new subscribers to the list.
- Synchronize with List**  
Adds new subscribers found in the imported data to the list and updates existing list subscribers with the values found in the imported data.
- Full Synchronize with List**  
As synchronize, but additionally removes existing subscribers from the list if they are not included in the imported data.
- Remove from List**  
Removes the subscribers from the list that are specified by the imported data.



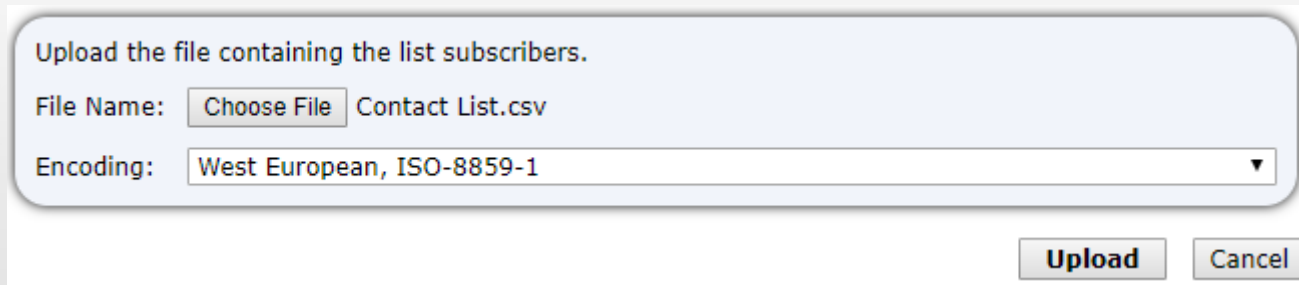
# Source

After you have chosen your Modification Type, you can specify the source for your contacts. For this example, we will choose to **Import list subscribers from a file**. Choose this option, and then click **Upload a file with list subscriber rows**:

The screenshot shows a multi-step wizard interface. At the top, a horizontal bar contains several tabs: 'Type', 'Type Details', 'Source' (which is highlighted with a blue background), 'Parse Details', 'Map Fields', 'Mapping Details', and 'Launch Import'. Below this bar are three buttons: 'Cancel' on the left, '<- Back' in the middle, and 'Next ->' on the right. The main content area is titled 'Source' and contains the text 'Information about the list subscribers import source.' Below this text are two radio button options: 'Import list subscribers from a file' (which is selected) and 'Import list subscribers from a database or LDAP directory'. At the bottom of the content area, it says 'Source File: No file uploaded' and provides a blue hyperlink: 'Upload a file with list subscriber rows'.

# Upload a File

Choosing to upload a file will bring up the option to **Choose File**. You can upload a CSV or Excel file as long as each contact is on a single line. Make sure to leave the Encoding field as-is, otherwise your contact list may not import properly! Click **Upload** when you are ready to proceed.



Upload the file containing the list subscribers.

File Name:  Contact List.csv

Encoding:  ▼

# Parse Details


If your contact list has a row with column headings, then Maestro will attempt to parse out any fields that are included in your data set. If not, you may need to fill in which columns correspond to which fields in Maestro you want to import data to. Email is the only required field, however you may have others depending on how your Subscriber Dataset is set up. The next page shows an example of this.

# Parse Details

Once you have confirmed that the data in the Preview looks correct, you can click **Next** to map the columns in your contact list to their respective fields in Maestro.

**Parse Details**

LISTSERV Maestro has parsed the uploaded file to extract the subscriber information.

**File "Contact List.csv" uploaded successfully, please review the parse results** 

LISTSERV Maestro has parsed the uploaded file "Contact List.csv" with standard settings. The preview below should show the uploaded data separated into profile field columns.  
[Click here](#) if this is not the case or if the data is unreadable.

**Header Row**

- Yes, the first row in the file contains the headers
- No, the file does not have a header row

**Preview**

Email
ITHelp@uoguelph.ca

# Map Fields

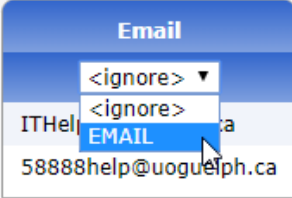
The final step in the import process is to map the headings in your contact list to the field in Maestro to which you want to import them to. Only **Email** is required, but if there are any other custom fields in your Subscriber Dataset, you will be able to select them here. Once you are done assigning columns to fields, you can click **Next**.

**Map Fields**

This page allows you to map the columns of your file to the fields defined in the subscriber list.

Please map all mandatory list fields to corresponding file columns to supply all required data for the subscribers you want to modify in the list.

Mandatory fields: EMAIL 🔄



🔄 field not mapped ✓ field mapped ✗ field mapped to more than one file column

# Launch Import

Now that you have finished the steps in the import wizard, you can click **Launch** to import your contacts! You will see a summary screen once this step is complete.

[Type](#) [Type Details](#) [Source](#) [Parse Details](#) [Map Fields](#) [Mapping Details](#) **Launch Import**

**Launch Import**

Click on the Launch button to start modifying/deleting the list subscribers specified in the imported file.

**Upload Options**

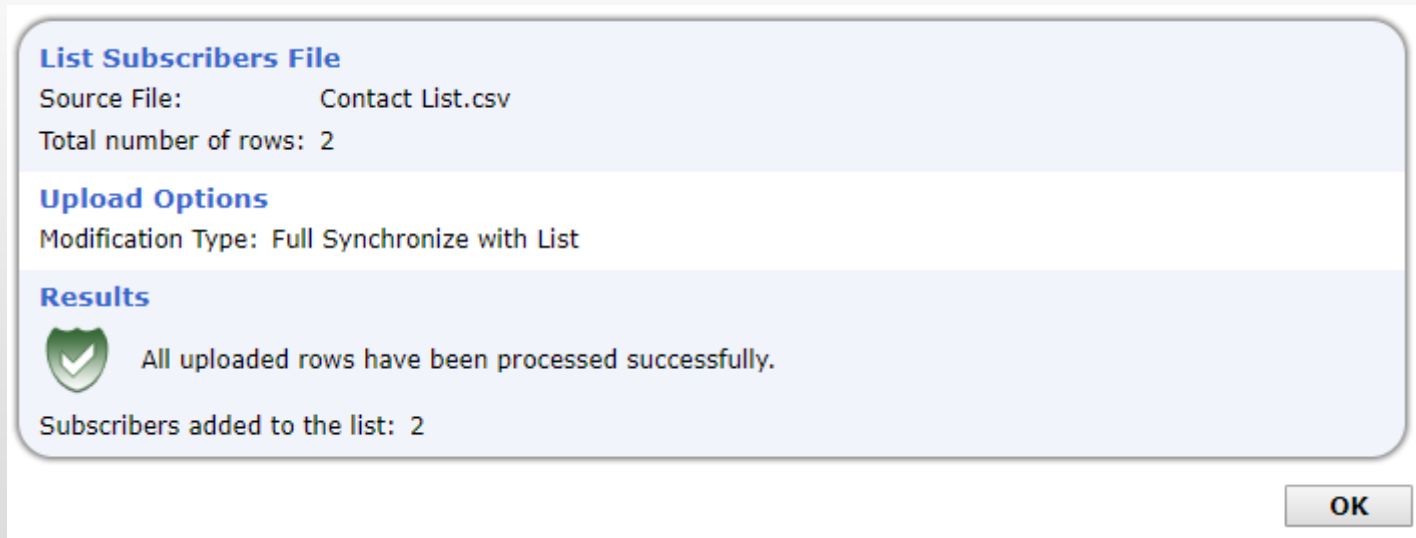
Modification Type: Full Synchronize with List

**Import List Subscribers From a File**

Source File: Contact List.csv

# Import Summary


Maestro will show you a summary of your import request – the file you chose, the lines that were parsed, and the total number of successfully updated contacts. Any errors will be shown in this summary, and you will see details explaining what went wrong. Click **OK** and your list is now updated and ready for use!



The screenshot shows a dialog box titled "List Subscribers File" with a light blue header. Below the header, the "Source File" is "Contact List.csv" and the "Total number of rows" is "2". The "Upload Options" section shows "Modification Type: Full Synchronize with List". The "Results" section features a green shield icon with a checkmark and the text "All uploaded rows have been processed successfully." Below this, it states "Subscribers added to the list: 2". An "OK" button is located in the bottom right corner of the dialog box.

**List Subscribers File**  
Source File: Contact List.csv  
Total number of rows: 2

**Upload Options**  
Modification Type: Full Synchronize with List

**Results**  
 All uploaded rows have been processed successfully.  
Subscribers added to the list: 2

OK

# Adding a Single Subscriber

To add a single subscriber to your list, right-click on **All List Subscribers**, and select **Add Subscriber...**

Explorer New Edit Utility LISTSERV Help Preferences Logout

Dashboard > Subscriber Warehouse > Subscriber Datasets > Newsletter List > Newsletter List > All List Subscribers

Dashboard

- Mail Jobs
- Reports
- Subscriber Warehouse
  - Subscriber Datasets
  - Newsletter List
    - Newsletter List
    - All List Subscribers
- Custom Pages & Reports
- Subscriber List Tests
- Lookup Tables
- Target Groups
- Suppression List
- Content Templates

Activity: [Search]

EMAIL	Subscription Date
58888help@uoguelph.ca	Jul. 15, 2019 01:44:58 PM
ITHelp@uoguelph.ca	Jul. 15, 2019 01:45:12 PM

All result records shown

- New List Segment...
- New Segment Folder
- Add Subscriber...
- Subscriber Import
- Download All Subscribers



# Adding a Single Subscriber

From this interface, you simply need to enter the email address of the subscriber you wish to add and click **OK**.

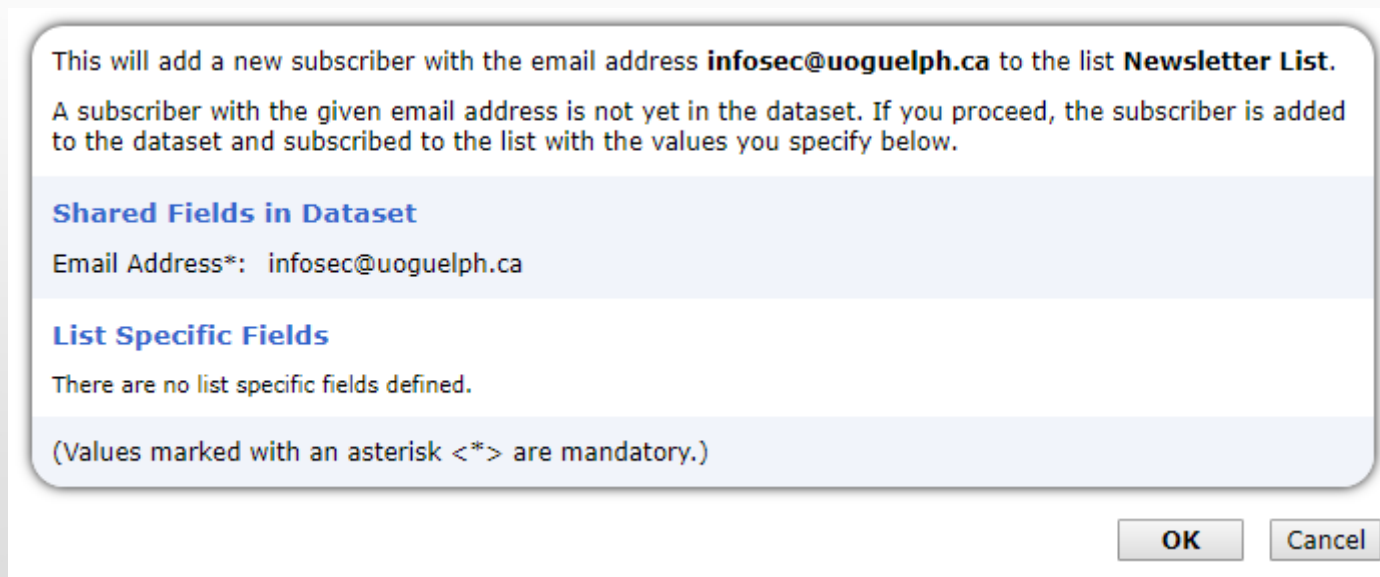
This will add a new subscriber to the list **Newsletter List** and will, if necessary, automatically add this subscriber to the dataset.

Please supply the email address of the subscriber that you want to add to the list:

Email Address:

# Adding a Single Subscriber

Maestro will check to see if the subscriber is already in the dataset. If not, you will be able to add them right away. If they are in the dataset, Maestro will simply add them to this specific contact list. Click **OK** to import the subscriber.



This will add a new subscriber with the email address **infosec@uoguelph.ca** to the list **Newsletter List**.

A subscriber with the given email address is not yet in the dataset. If you proceed, the subscriber is added to the dataset and subscribed to the list with the values you specify below.

**Shared Fields in Dataset**

Email Address\*: infosec@uoguelph.ca

**List Specific Fields**

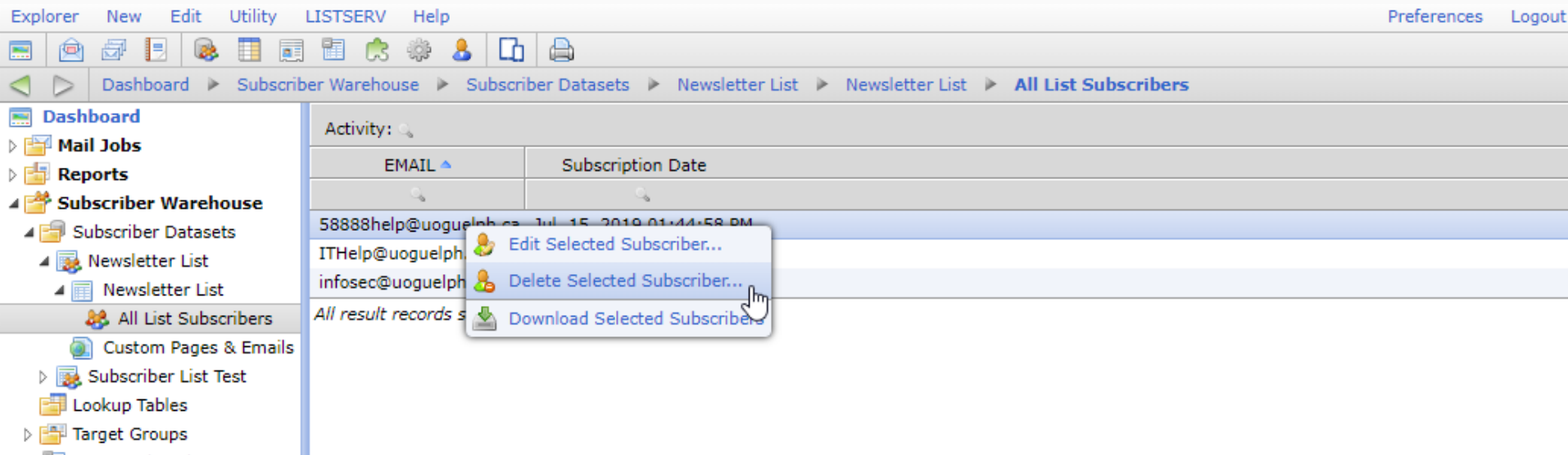
There are no list specific fields defined.

(Values marked with an asterisk <\*> are mandatory.)

OK Cancel

# Deleting a Single Subscriber

You can include an unsubscribe link in your email template, however this will simply add the user to the suppression list in your account. To fully remove a user from your contact list, right-click on the user's name, and you can select the option to **Delete Selected Subscriber...**



The screenshot displays a web application interface for managing subscribers. The top navigation bar includes 'Explorer', 'New', 'Edit', 'Utility', 'LISTSERV', and 'Help'. The breadcrumb trail shows the path: 'Dashboard > Subscriber Warehouse > Subscriber Datasets > Newsletter List > Newsletter List > All List Subscribers'. The left sidebar contains a tree view with categories like 'Mail Jobs', 'Reports', 'Subscriber Warehouse', and 'All List Subscribers'. The main content area shows a table with columns 'EMAIL' and 'Subscription Date'. A context menu is open over a subscriber row, offering options: 'Edit Selected Subscriber...', 'Delete Selected Subscriber...' (highlighted by a mouse cursor), and 'Download Selected Subscriber...'. The table data includes email addresses like '58888help@uoguelph.ca' and 'ITHelp@uoguelph.ca'.



## Questions? Comments?

Thank you for using Maestro to handle your email needs! If this support document was valuable, or if you have found any errors or omissions in the steps and suggestions provided, please notify the CCS Help Center [IThelp@uoguelph.ca](mailto:IThelp@uoguelph.ca) or Ext. 58888 and your message will be directed to the appropriate team.