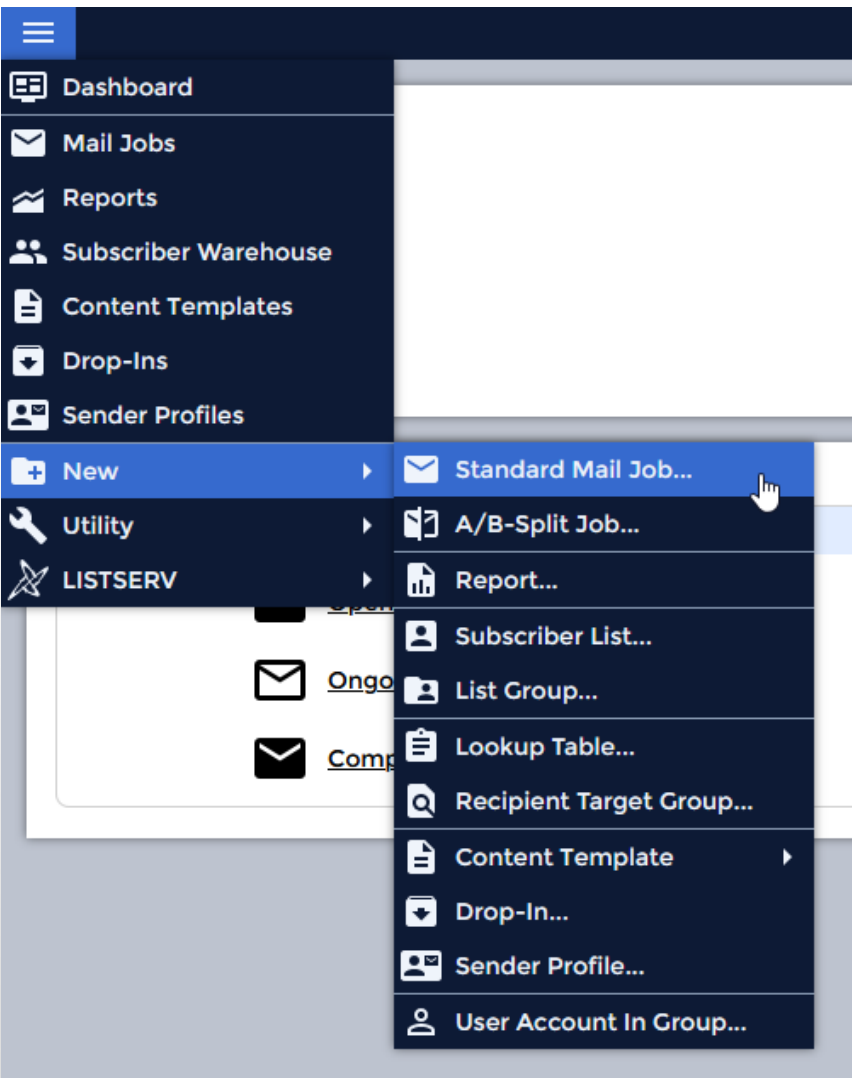


Creating an Email in Maestro

Creating the Email Message



After logging into Maestro, the first thing you'll want to do is create a new Mail Job.

You can do this by selecting the stacked menu icon in the top, left-hand corner of Maestro, hovering over the **New** menu option and selecting **Standard Mail Job**

Creating the Email Message

Once you have assigned the job a title, you will now see the steps required to create the email message. Click on **Define Recipients** to get started.

The screenshot displays a workflow interface for creating an email message. The title bar at the top reads "CCS Update Message (ID: 201124E) - Mail Job Definition - Workflow". The workflow consists of seven steps, each with an icon, a title, a status, and a description:

- Define Recipients**: Pending, <no recipients defined> (Icon: Two people)
- Define Email Content**: Pending: Text email content, Subject: <undefined> | Text content: <undefined> | Attachments: 0 (Icon: Document)
- Define Tracking**: Complete: Tracking is enabled, Type: Unique | Link Tracking: Automatic (Icon: Target)
- Define Sender**: Pending, <no sender defined> (Icon: Person)
- Schedule Delivery**: Pending, <delivery settings undefined> (Icon: Clock)
- Send Test Emails**: Pending, <not tested> (Icon: Magnifying glass)
- Authorize Delivery**: Pending, Authorize the delivery of the job (Icon: Checkmark)

Define the Recipients for Your Email

By Default, Maestro is configured to show the Subscriber Lists that are set up within your account, but there are several other options for adding recipients to your email campaign. If you wish to send to one of the alternate options, click on the [Click here to change](#) link at the bottom of the Define Recipients screen:

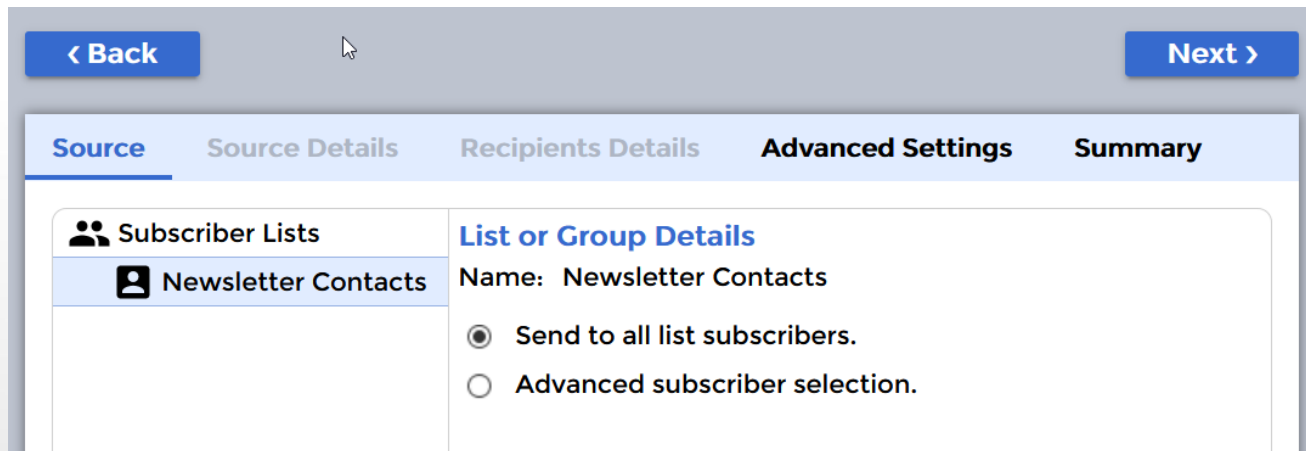
The screenshot shows the 'Define Recipients' screen in Maestro. At the top, there are navigation buttons for '< Back' and 'Next >'. Below these are tabs for 'Source', 'Source Details', 'Recipients Details', 'Advanced Settings', and 'Summary'. The 'Source' tab is active, showing a list of options: 'Subscriber Lists' (selected) and 'Newsletter Contacts'. The main content area displays the message 'No subscriber list or group selected.' At the bottom, there is a message: 'Do you need to get the recipients from a different source? [Click here to change.](#)' with a mouse cursor pointing to the link.

Define the Recipients for Your Email

- The most common sending options used at the University are:
 - **Send to a Subscriber List** – choose this option if your Maestro configuration sends to an LDAP list or a list stored within Maestro that you maintain
 - **Send to a Classic LISTSERV List** – choose this option if your Maestro configuration sends to an existing LISTSERV list
 - **Upload Recipients** – choose this option if you plan on uploading a CSV file with recipient information.
- You can also **Determine Recipients Based on the Reaction on a Previous Job**, including whether they opened the email or clicked on a specific link.
- You can also choose to **Copy the Recipients Definition** from a previous email campaign.

Sending to a Subscriber List

If you selected **Send to a Subscriber List**, you will see the option to select your list to add to this email:

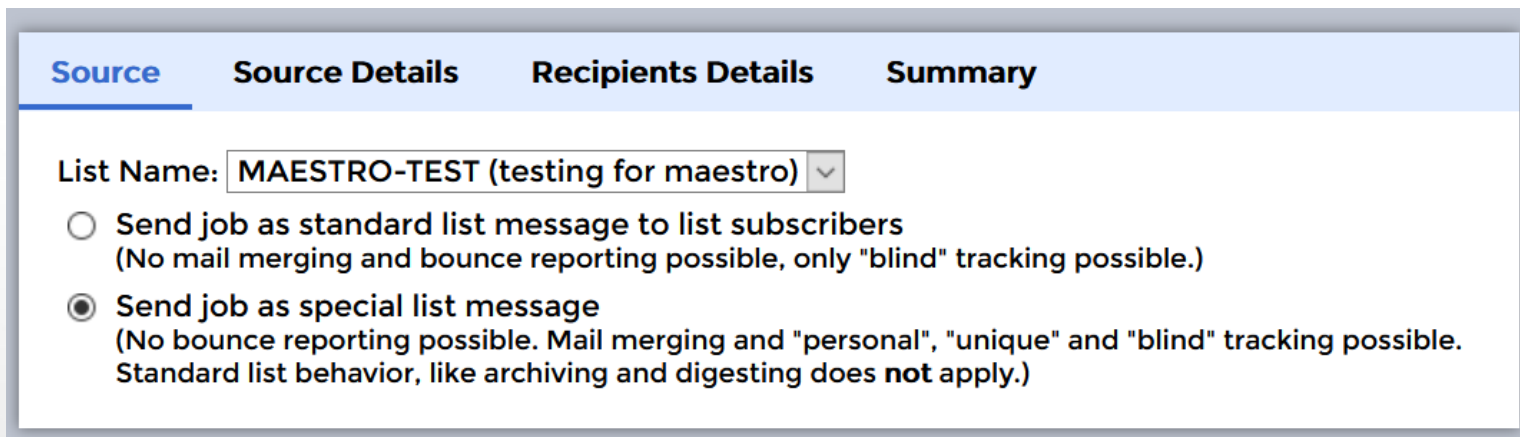


The screenshot shows a web interface for sending an email to a subscriber list. At the top, there are two blue buttons: '< Back' on the left and 'Next >' on the right. Below these is a horizontal navigation bar with five tabs: 'Source', 'Source Details', 'Recipients Details', 'Advanced Settings', and 'Summary'. The 'Source' tab is currently selected. The main content area is divided into two columns. The left column, titled 'Subscriber Lists', contains two items: 'Subscriber Lists' (with a group icon) and 'Newsletter Contacts' (with a person icon), the latter of which is highlighted with a blue background. The right column, titled 'List or Group Details', shows the selected list's name as 'Newsletter Contacts' and offers two radio button options: 'Send to all list subscribers.' (which is selected) and 'Advanced subscriber selection.'.

Once selected, you can click **Next**, and make any changes needed under **Advanced Settings**. Click **Finish** on the **Summary** page when you are done to advance to the next step.

Sending to a LISTSERV List

If you selected **Send to a Classic LISTSERV List**, click **OK** and you will be prompted to select the LISTSERV List you wish to send to:



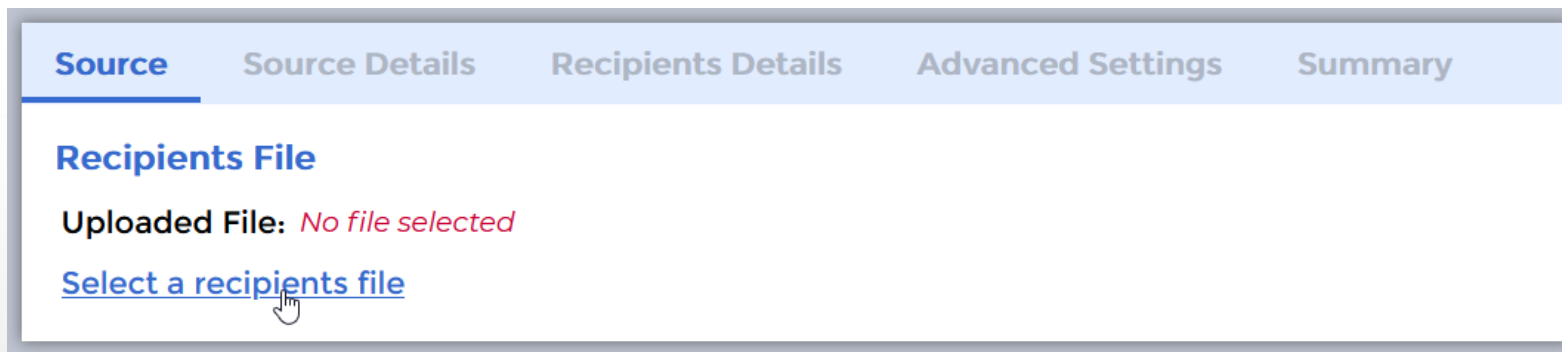
The screenshot shows a dialog box with four tabs: **Source**, **Source Details**, **Recipients Details**, and **Summary**. The **Source** tab is selected. Below the tabs, there is a "List Name:" label followed by a dropdown menu showing "MAESTRO-TEST (testing for maestro)". Below this, there are two radio button options:

- Send job as standard list message to list subscribers
(No mail merging and bounce reporting possible, only "blind" tracking possible.)
- Send job as special list message
(No bounce reporting possible. Mail merging and "personal", "unique" and "blind" tracking possible. Standard list behavior, like archiving and digesting does **not** apply.)

CCS must enable Maestro to send to your LISTSERV list, so if you do not see your list here, please contact ITHelp@uoguelph.ca. Click **Next** and choose any additional settings under **Source** and **Recipient Details**. Once you are finished, click **Finish** to advance to the next step.

Sending to an Uploaded List

If you selected **Upload Recipients**, click **OK** and you will be prompted to upload a file:

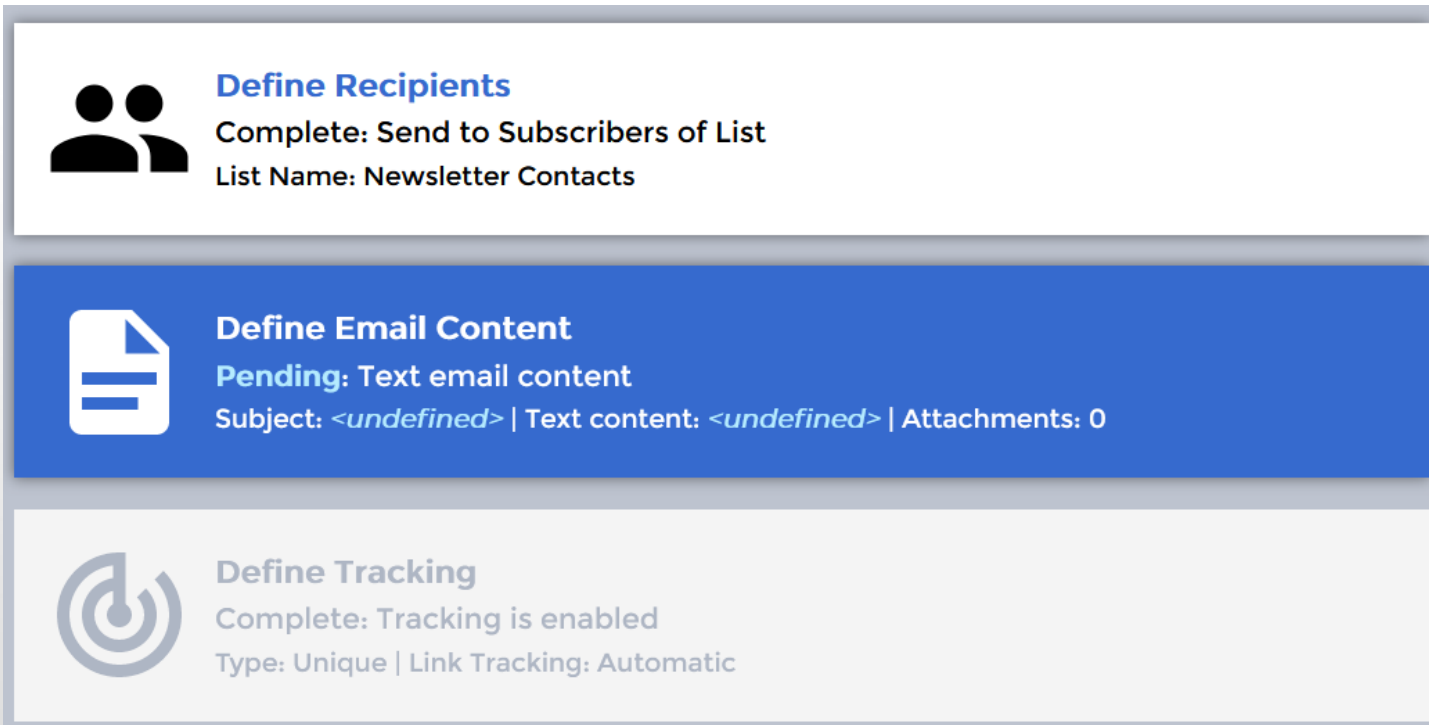


The screenshot shows a web interface with a navigation bar at the top containing five tabs: 'Source', 'Source Details', 'Recipients Details', 'Advanced Settings', and 'Summary'. The 'Source' tab is currently selected and highlighted with a blue underline. Below the navigation bar, the main content area is titled 'Recipients File' in blue. Underneath this title, the text 'Uploaded File: *No file selected*' is displayed in red. At the bottom of this section, there is a blue hyperlink that reads 'Select a recipients file', which is being pointed to by a mouse cursor.

Your upload file must contain one column with email addresses in it, but does not require any other information in order to send. Once you have uploaded your file, click **Next** until you reach the **Summary** page, and click **Finish** to advance to the next step.

Defining the Email Message

Now that the recipients for your message have been defined, it's time to click on **Define Email Content** to start creating your email.



The screenshot displays three steps in a vertical list:

- Define Recipients** (white background):
 - Icon: Two black silhouettes of people.
 - Status: Complete: Send to Subscribers of List
 - Detail: List Name: Newsletter Contacts
- Define Email Content** (blue background, highlighted):
 - Icon: White document icon with a folded corner.
 - Status: Pending: Text email content
 - Detail: Subject: <undefined> | Text content: <undefined> | Attachments: 0
- Define Tracking** (white background):
 - Icon: Gray target icon with a play button in the center.
 - Status: Complete: Tracking is enabled
 - Detail: Type: Unique | Link Tracking: Automatic

Defining the Email Message

Before selecting your template and filling in your content, make sure to enter a subject line – this step is easy to miss, but is required to save your email:

[Store Recovery Copy](#)


Save & Close

Subject: *Enter Subject Here*



Defining the Email Message

Once you have entered your subject line, click on Open Template Gallery in the main window to select your template.



Start Defining Your Content

There is currently no content defined.
Please use the template gallery to:

- Select a predefined content template
- Start with an empty html or plain text content
- Upload content created in external editor

[Open Template Gallery](#)

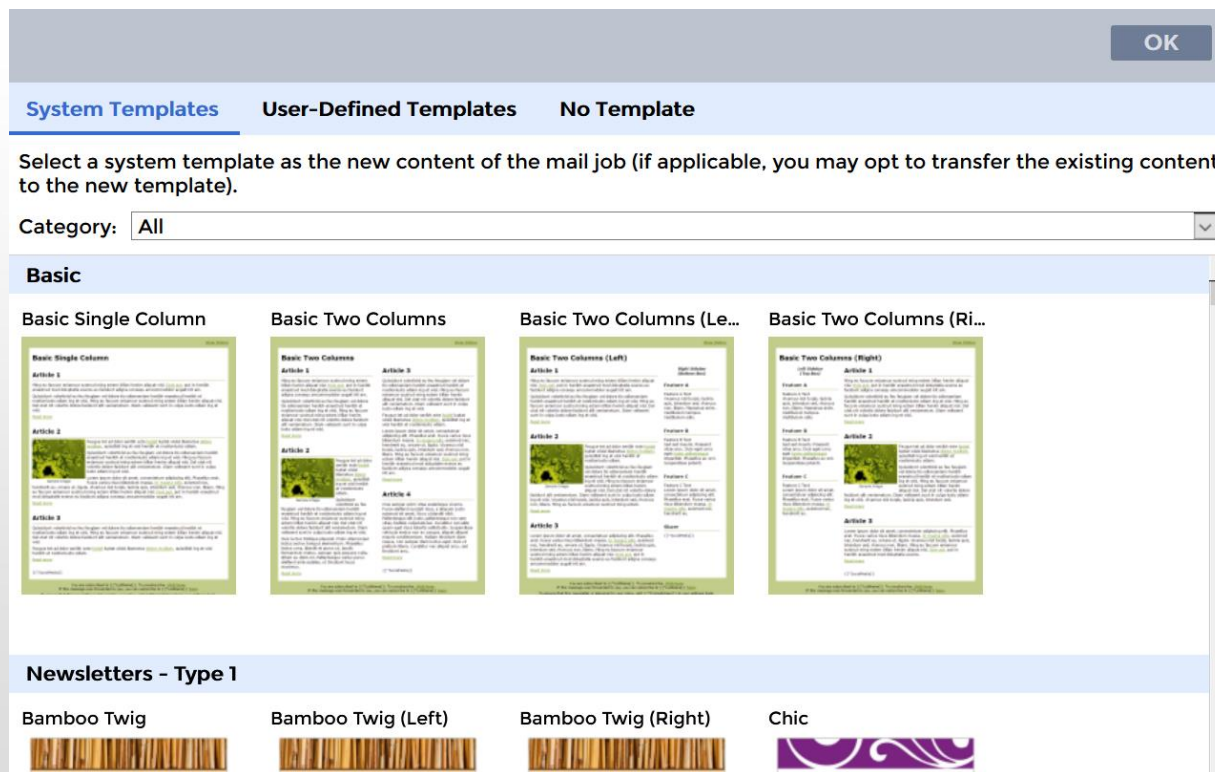
Defining the Email Message

If you have a template set up in Maestro, you will find these under **User-Defined Templates**. Click on the name of the template and select **OK** to start editing it.



Defining the Email Message

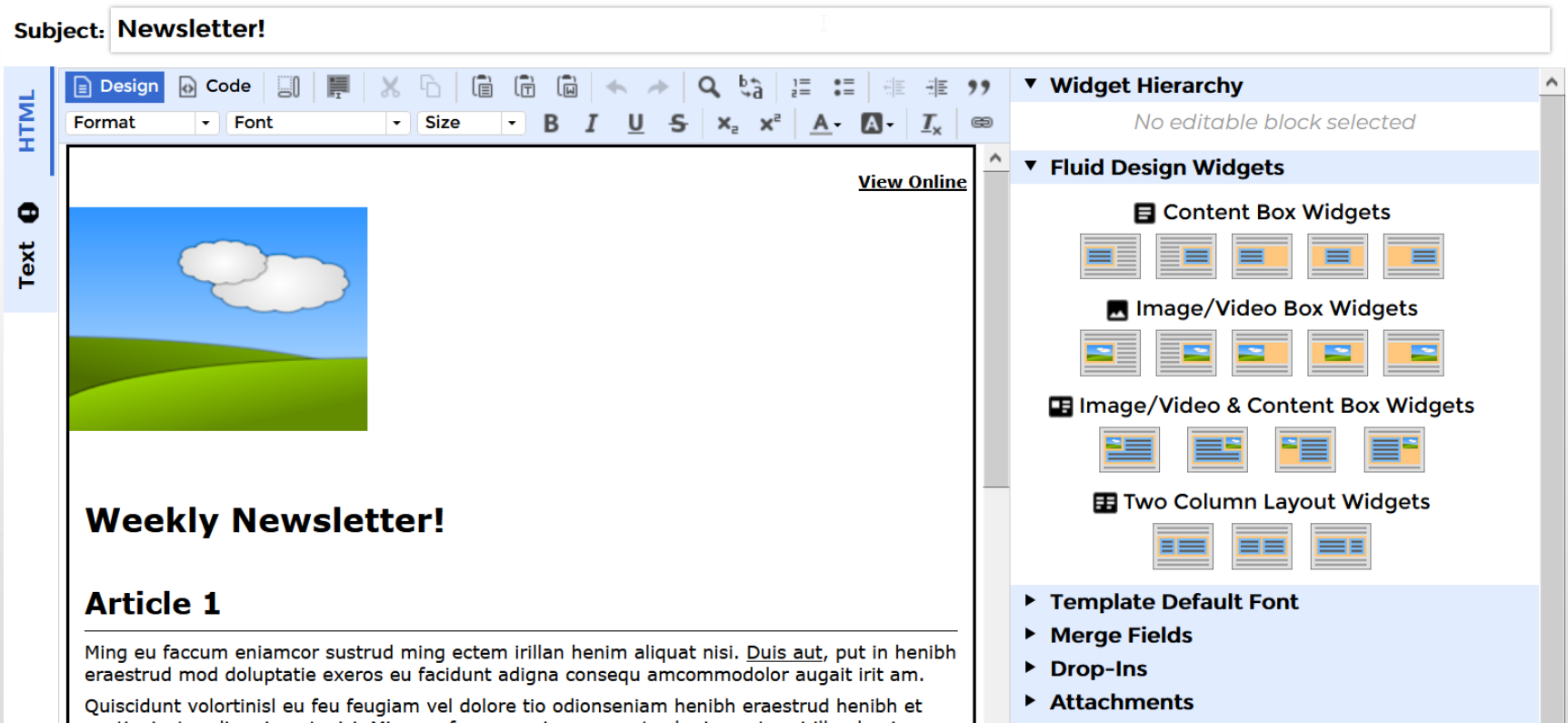
If you wish to use one of the included Maestro templates, click on the **System Templates** tab, and you can browse by category. All the templates can be edited and customized as needed.



Defining the Email Message

Once you have selected your template, you will be taken directly to the HTML editing area so you can start building your email!

Subject:



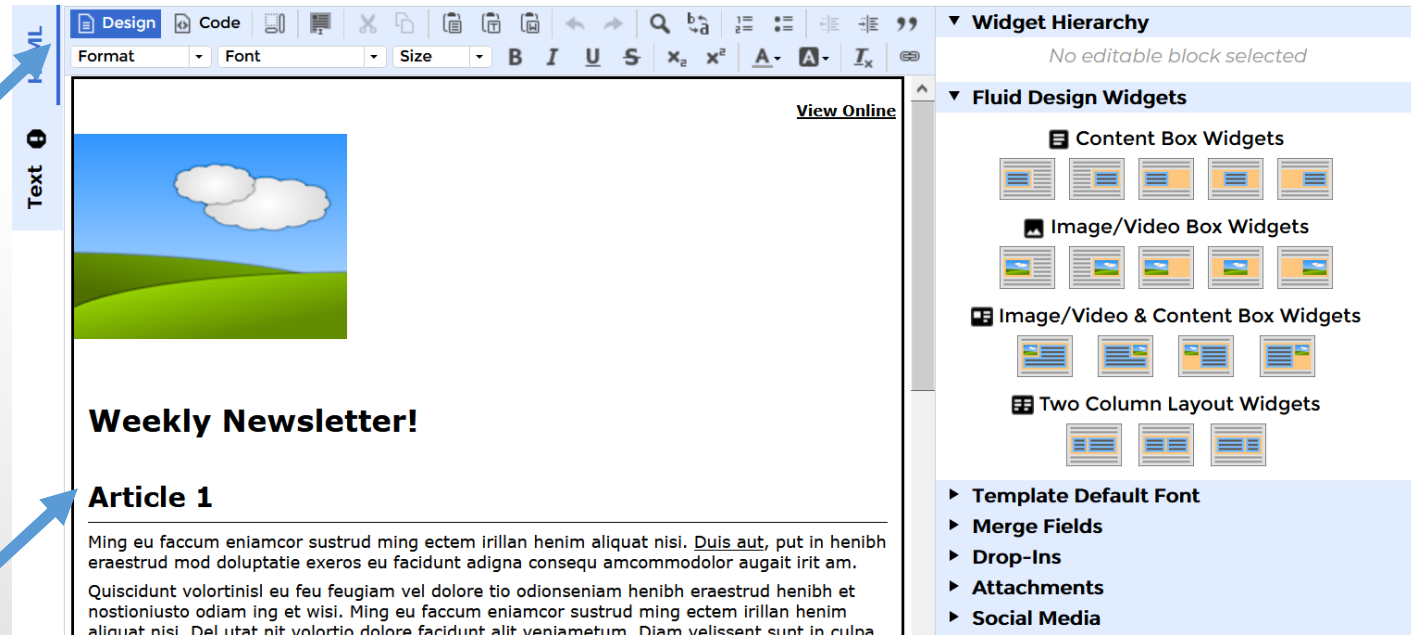
The screenshot displays an email editor interface. At the top, there is a subject line field containing "Newsletter!". Below this is a toolbar with various editing tools, including a "Design" tab, a "Code" tab, and various icons for text formatting, alignment, and insertion. The main editing area shows a preview of an email template with a landscape image, the heading "Weekly Newsletter!", and the sub-heading "Article 1". To the right of the main editing area is a "Widget Hierarchy" panel, which is currently empty, displaying "No editable block selected". Below this panel is a "Fluid Design Widgets" section, which contains several categories of widgets: "Content Box Widgets", "Image/Video Box Widgets", "Image/Video & Content Box Widgets", and "Two Column Layout Widgets". Each category contains several small thumbnail icons representing different widget designs. At the bottom of the widget hierarchy panel, there are several expandable sections: "Template Default Font", "Merge Fields", "Drop-Ins", and "Attachments".

Defining the Email Message

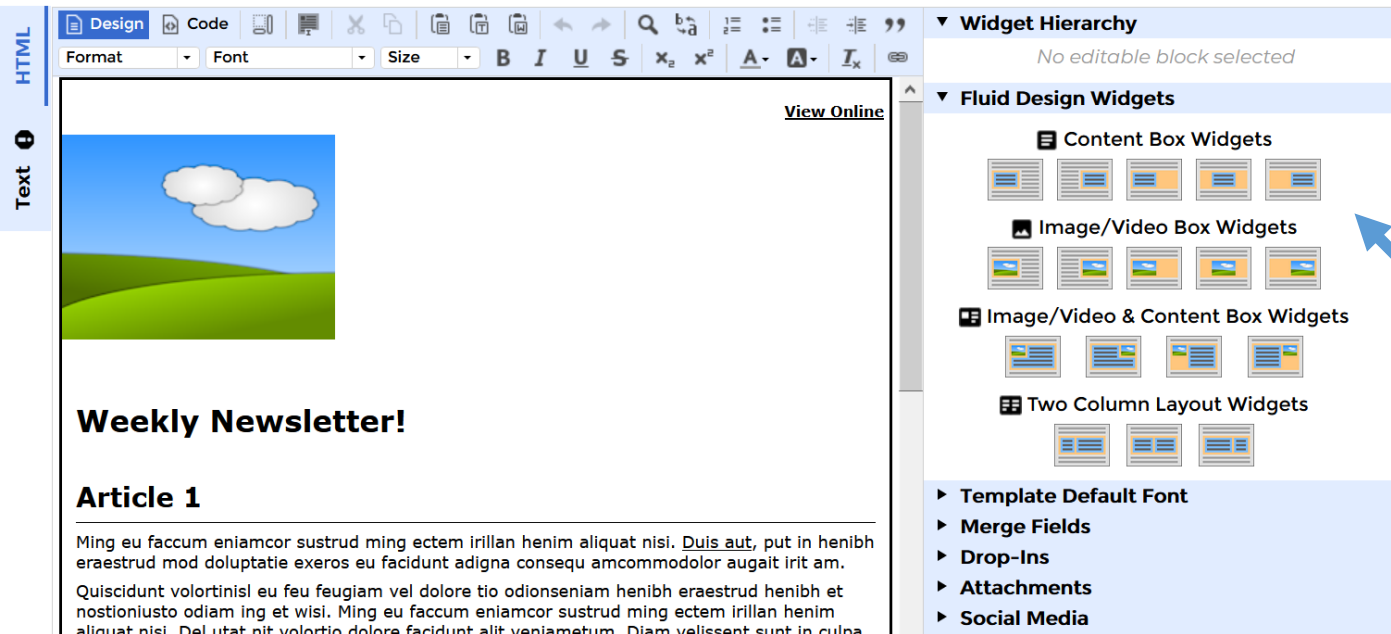
The email editing area in Maestro is defined into several areas:

Editing tools allow you to change the format of your font, create links, and switch to HTML editing.

The main editing area is where you add your content, including text and images. Add the Fluid Design Widgets here in order to add text and content.



Defining the Email Message



The screenshot displays the user interface of an email design tool. On the left, a vertical sidebar contains 'HTML' and 'Text' options. The main workspace is divided into a top toolbar with 'Design' and 'Code' tabs, and a central preview area. The preview area shows a landscape image with a blue sky, white clouds, and green hills. Below the image, the text reads: 'Weekly Newsletter!', 'Article 1', and a paragraph of placeholder text: 'Ming eu faccum eniamcor sustrud ming ectem irillan henim aliquat nisi. Duis aut, put in henibh eraestrud mod doluptatie exeros eu facidunt adigna consequ amcommodolor augait irit am. Quiscidunt volortinisl eu feu feugiam vel dolore tio odionseniam henibh eraestrud henibh et nostioniusto odiam ing et wisi. Ming eu faccum eniamcor sustrud ming ectem irillan henim aliquat nisi. Del utat nit volortio dolore facidunt alit veniametum. Diam velissent sunt in culpa'. A 'View Online' link is visible in the top right of the preview area. On the right side, a 'Widget Hierarchy' panel is open, showing a tree structure of widgets. The 'Fluid Design Widgets' section is expanded, listing: 'Content Box Widgets', 'Image/Video Box Widgets', 'Image/Video & Content Box Widgets', and 'Two Column Layout Widgets'. Below this, other sections like 'Template Default Font', 'Merge Fields', 'Drop-Ins', 'Attachments', and 'Social Media' are visible. A blue arrow points from the 'Image/Video & Content Box Widgets' section towards the right.

Fluid Design Widgets are the content building blocks of Maestro. You can add these to your email by clicking on the location in your message you want to add new content and selecting the type of content you want to add. The **Fluid Design Widget** will automatically appear when clicked on, and you can edit it to add new content to your email.

Defining the Email Message

If you have selected a **Fluid Design Widget** that includes an image, you can double-click on the image placeholder to upload your image:



Defining the Email Message

Maestro does not have a built-in image library, so you will need to upload new images as you use them. Select the button marked **Select Image/Video** to upload your image. From this area, you can click on the Select File button to pick the image.

Image/Video Selection

Please select the image or video that is to be used.

Image from File

No File Selected

External Image Reference

URL:

Thumbnail-Link to YouTube Video

YouTube Video ID or URL:

Thumbnail Size:

Defining the Email Message

- A few notes on including images:
 - You may need to add some padding around your image if you find the text is too close. You can do this by double-clicking on the image, and adding left, right, top or bottom padding as needed.
 - **Maestro does not re-size images automatically**, so you will need to ensure that your images are the correct size before you upload them to Maestro.
 - There is no limit to how many images you can include in a Maestro email.
 - You can link to a URL from an image by double-clicking on the image and filling in the Image Link URL at the bottom of the widget details.

Defining the Email Message

If you need to create a space between two Fluid Design Widgets in order to add another, you can hover your mouse over the space between the two Fluid Design Widgets and a red button will appear that will create a new line if clicked on:



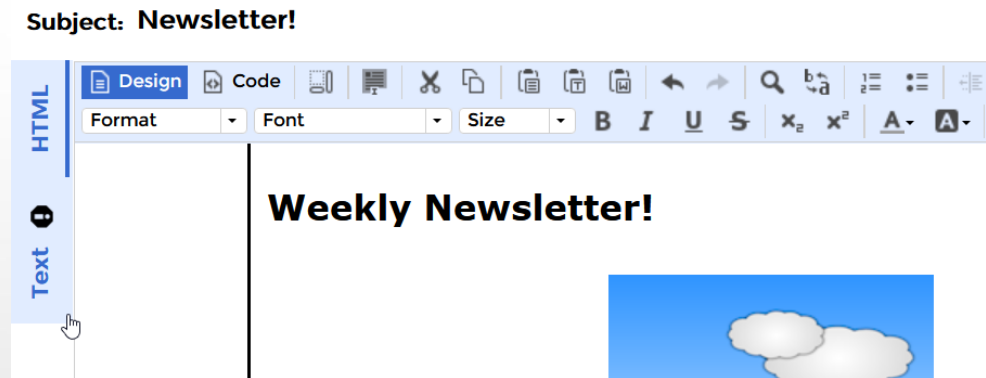
The screenshot shows an email message editor interface. At the top, the text "This is my newsletter!" is centered. Below this, there are three Fluid Design Widgets, each with a description:

- The first widget is titled "MAKING HEADLINES" and has a "Widget" button. The description next to it says "This is content next to an image."
- The second widget is a photograph of a man in a suit standing in front of a building with "UNIVERSITY GUELPH" on it. The description next to it says "This is also content next to an image."
- The third widget is a colorful logo consisting of several curved lines in red, orange, yellow, green, and blue. The description next to it says "This is a link which is [next to an image](#)."

A red button with a white square icon is visible on the right side of the editor, indicating where a new line can be added between widgets.

Defining the Email Message

Once you are finished adding content to your newsletter, you can click **OK** in the bottom, right-hand corner of the page to exit the HTML editor. You will still need to specify Text content for your email, which you can do by clicking on the **Text** tab:



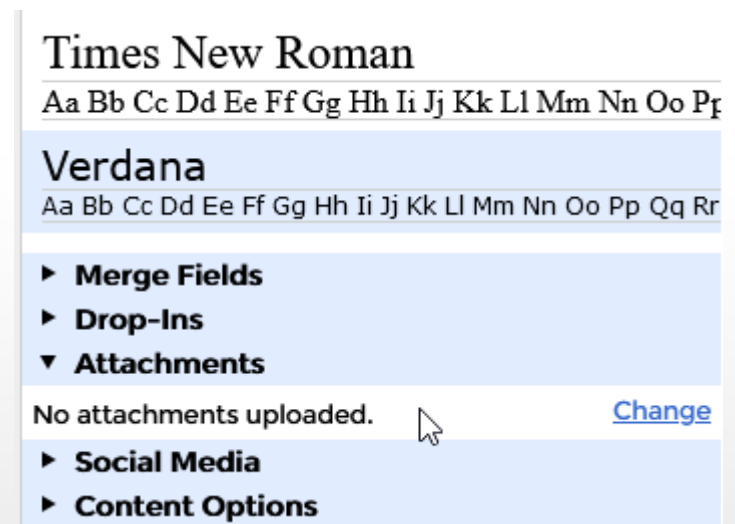
Text content can simply be the text of your email – without images – and any links to content you are sharing. The Text version of the email is rarely used, but it is required in the event a users' browser does not support full HTML emails.

Defining the Email Message

If you need to add an Attachment to your Mass Mail message, you can click on the **Attachments** option underneath the Template Default Font section in the HTML editor.

You can attach files to your email, and it will be sent to all recipients. Please note that large files may not be delivered as intended, that the acceptable file size for attachments varies based on email system.

Once you are satisfied that your email content is complete, you can click **Save and Close** in the top, right-hand corner of the page to advance to the next step.



Changing the Job Tracking Type

The next setting we will need to set up is the job tracking. This step is marked as complete by default, but you may want to make changes depending on how you want to report on the success of your campaign. Click on **Define Tracking** in the job steps to open this setting.



Define Email Content

Complete: HTML content with text alternative

Subject: Newsletter! | HTML content: defined | Text alternative: defined | Attachments: 0



Define Tracking

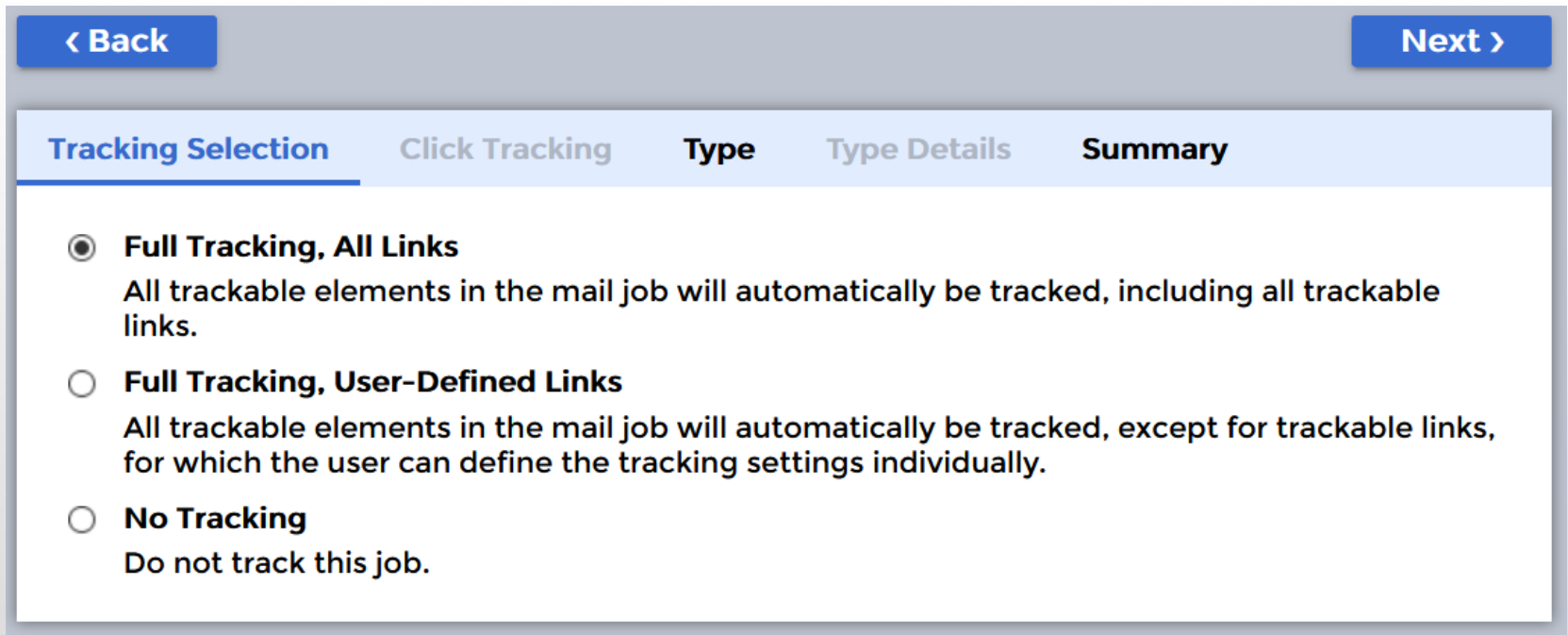
Complete: Tracking is enabled

Type: Unique | Link Tracking: Automatic



Changing the Job Tracking Type

The first page of settings for Job Tracking allows you to select what type of tracking you want to use. By default **Full Tracking, All Links** is selected, but you can choose to track only the links you want to track, or turn off tracking entirely for this email:

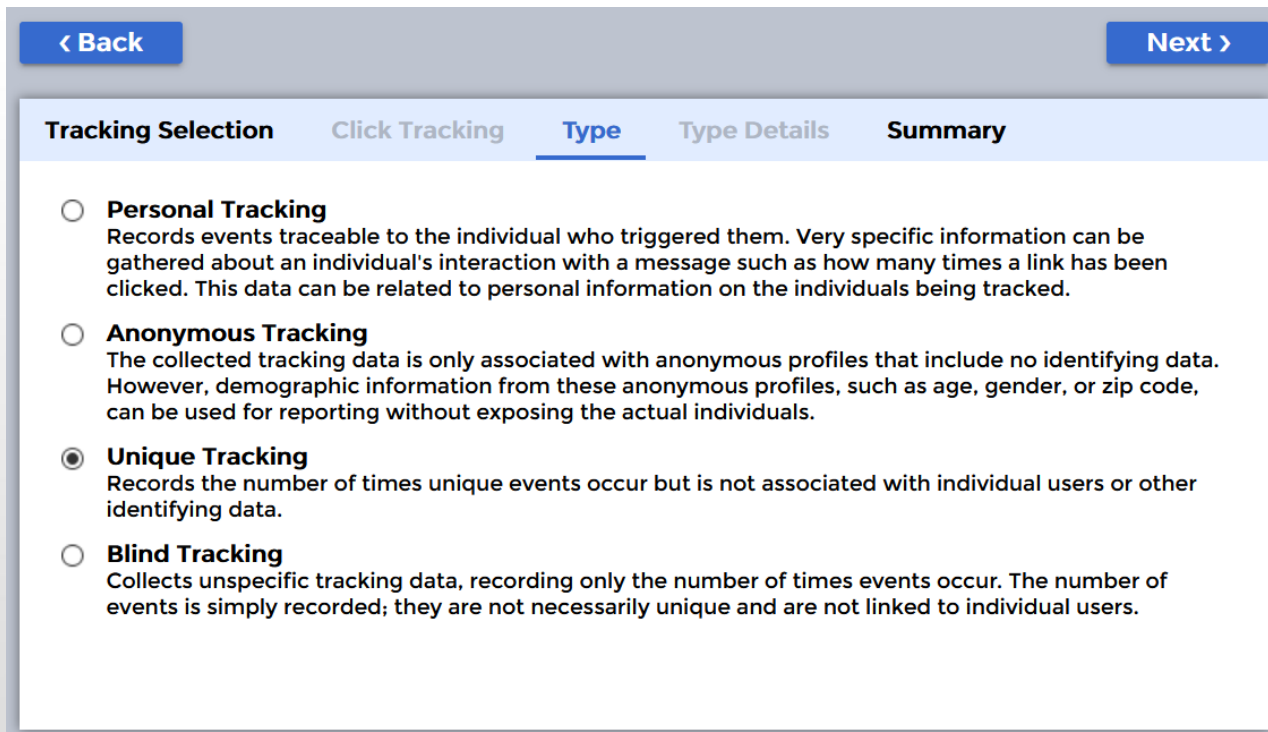


The screenshot shows a settings page for Job Tracking. At the top, there are two blue buttons: "< Back" on the left and "Next >" on the right. Below these is a navigation bar with five tabs: "Tracking Selection" (which is underlined and highlighted in blue), "Click Tracking", "Type", "Type Details", and "Summary". The main content area contains three radio button options:

- Full Tracking, All Links**
All trackable elements in the mail job will automatically be tracked, including all trackable links.
- Full Tracking, User-Defined Links**
All trackable elements in the mail job will automatically be tracked, except for trackable links, for which the user can define the tracking settings individually.
- No Tracking**
Do not track this job.

Changing the Job Tracking Type

The Tracking Type settings allow you to specify how granular you wish to track individual recipient responses. Their descriptions explain the function of each tracking type:



The screenshot shows a web interface for selecting a tracking type. At the top, there are navigation buttons: '< Back' on the left and 'Next >' on the right. Below these is a horizontal menu with five tabs: 'Tracking Selection', 'Click Tracking', 'Type', 'Type Details', and 'Summary'. The 'Type' tab is currently selected and underlined. The main content area lists four tracking options, each with a radio button and a descriptive paragraph:

- Personal Tracking**
Records events traceable to the individual who triggered them. Very specific information can be gathered about an individual's interaction with a message such as how many times a link has been clicked. This data can be related to personal information on the individuals being tracked.
- Anonymous Tracking**
The collected tracking data is only associated with anonymous profiles that include no identifying data. However, demographic information from these anonymous profiles, such as age, gender, or zip code, can be used for reporting without exposing the actual individuals.
- Unique Tracking**
Records the number of times unique events occur but is not associated with individual users or other identifying data.
- Blind Tracking**
Collects unspecific tracking data, recording only the number of times events occur. The number of events is simply recorded; they are not necessarily unique and are not linked to individual users.

Changing the Job Tracking Type

When you are finished defining the Tracking Selection and Type, you will be shown a summary page that details all links that will be tracked as part of this campaign. You can use the **Back** button to make changes or select **Finish** to complete the Define Tracking step.

Defining the Sender

Once you have completed the Define Tracking step, click on **Define Sender** in the job steps area to state the email address you will use to send your email. You are only required to specify the email address but can also specify the Sender Name and Reply-To Address if needed.



Define Tracking

Complete: Tracking is enabled

Type: Unique | Link Tracking: Automatic



Define Sender

Pending

<no sender defined>



Delivery Settings

After you have defined the sending address for your message, the second-last step before the email is sent is to complete the delivery settings. Click on **Schedule Delivery** from the job steps area:



Define Sender

Complete: Communication & Public Affairs <spencelj@uoguelph.ca>

Reply-To: <no reply-to address defined>



Schedule Delivery

Pending

<delivery settings undefined>



Delivery Settings

Delivery Settings include three options, which are straightforward:

- **Immediately begin delivering the mail job** – this will not occur when you click OK, but when you complete the last step in the job steps, Authorize Delivery.
- **Wait until the mail job delivery is triggered** – this is accomplished through the main menu once the mail job has been set up.
- **Schedule the mail job delivery** – this will deliver the email at the date and time specified. Mail is sent based on the Eastern Time Zone and does account for Daylight Savings Time.

Once you have finished supplying Maestro with delivery information, click on **OK** to complete this step.

Delivery Test


Maestro requires a successful delivery test in order to send out the email. To set this up, select **Send Test Emails** from the job steps area, and you can specify the recipients of the test email, and configure testing the Text version of the email. Click **Send Test Emails Now** when you are done.

Note: Checking the message for spam is currently unavailable as we debug issues with the spam checking system.

[Save & Close](#) [Send Test Emails Now](#)

Message Spam Rating

Check if your configured spam filters would classify the message as spam:

 The message has not been checked for spam.
[Check message for spam](#)

Perform Delivery Test

Email Column: **EMAIL**

Subject:

Test line:

(This text is added to each test message)

Add Row	EMAIL
Clear Row	<input type="text" value="ccs@uoguelph.ca"/>
Clear Row	<input type="text"/>
Clear Row	<input type="text"/>

Send additional plain text email with alternative text
(Each test recipient will receive an additional copy of the test mail, as a plain text email that contains only the alternative text, for easier proof reading.)

Delivery Test

Once the email test is done, you will have to register with Maestro whether the test was successful or not. Select **YES** if you are satisfied with the test emails. You can still make edits to the email before it is sent out, however you will have to re-run the test if you make edits before the final send.

OK

The test emails have been delivered to the recipients supplied.

Number of delivered test recipients: 1

Number of suppressed test recipients: 0

Please wait until you have received the test emails. Depending on the Internet connection and the email systems involved, this may take a short while. Review test emails to verify they are acceptable.

Test Result Assessment

NO - The delivery test results are not acceptable!

YES - The delivery test results are acceptable.

Verify Later - View and verify the result of the delivery test at a later time.

Authorize Delivery

The last step in sending a mail message out through Maestro is to **Authorize Delivery** via the job steps menu.

You will see a summary of all settings you have specified at each of the steps while setting up your mail message, and a warning message if you have chosen to authorize the job to be delivered immediately.

Clicking **Authorize Delivery Now** will either send your email out right away, send it at the scheduled time specified in the Delivery Settings, or create the mail job, but wait for your trigger.

If you have chosen to deliver the job immediately, mail will now begin going out to your target list, and your email is complete!



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 Help Center at extension 58888 or ithelp@uoguelph.ca and your email will be directed to the appropriate team.