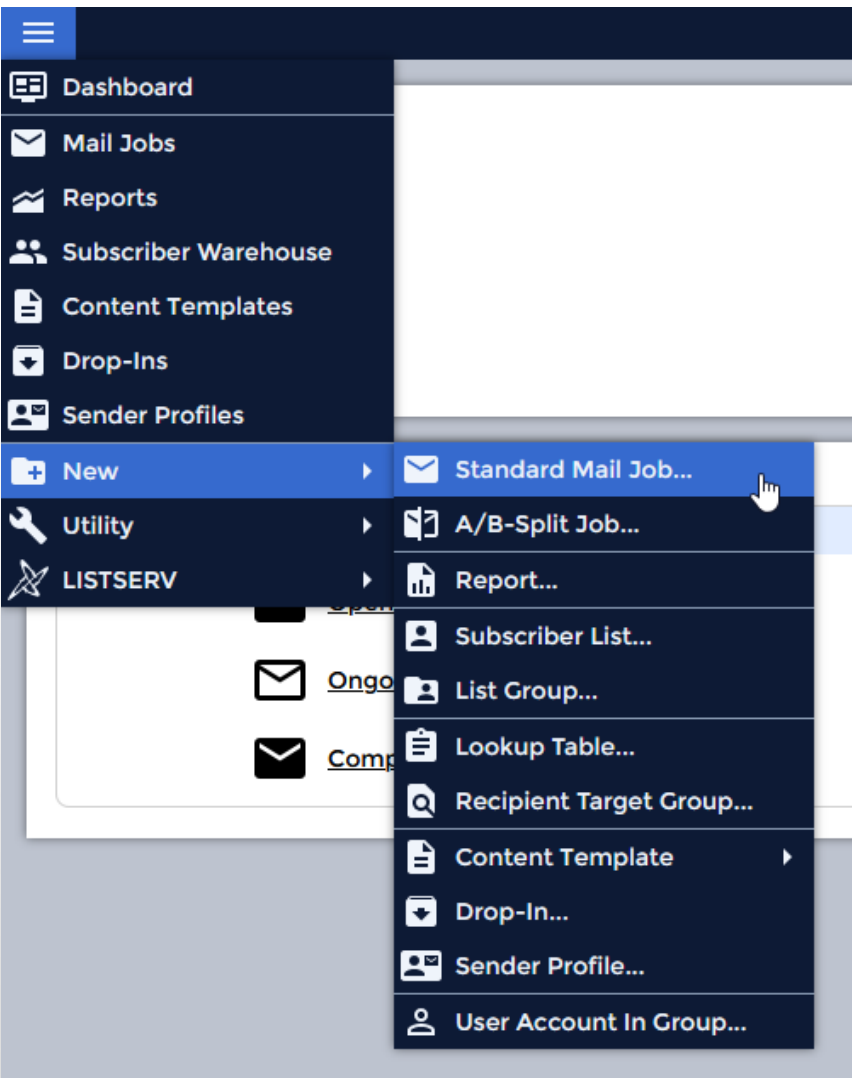# Creating an Email in Maestro

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.

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:
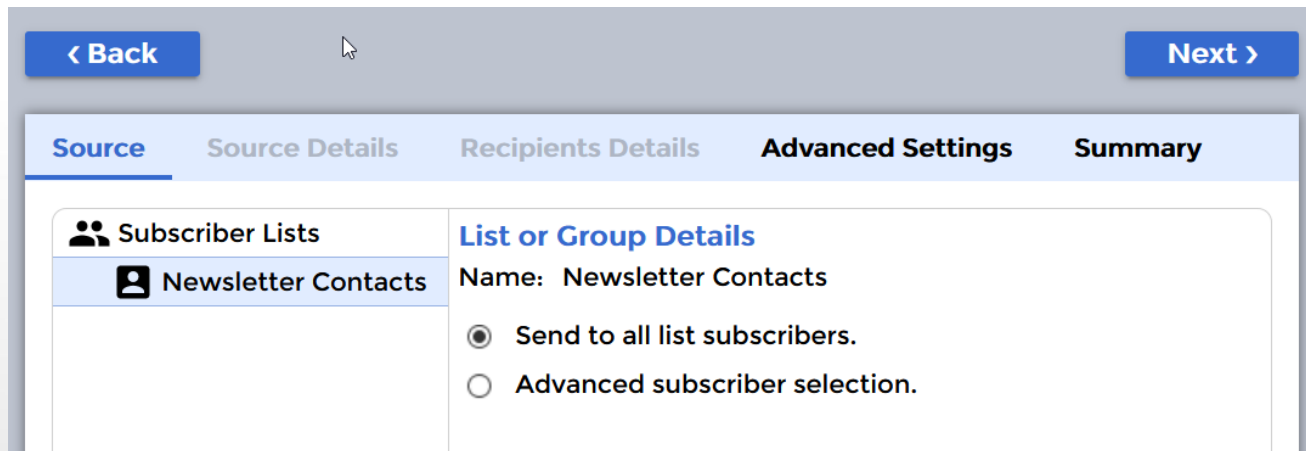
Define the Recipients for Your Email

- 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:
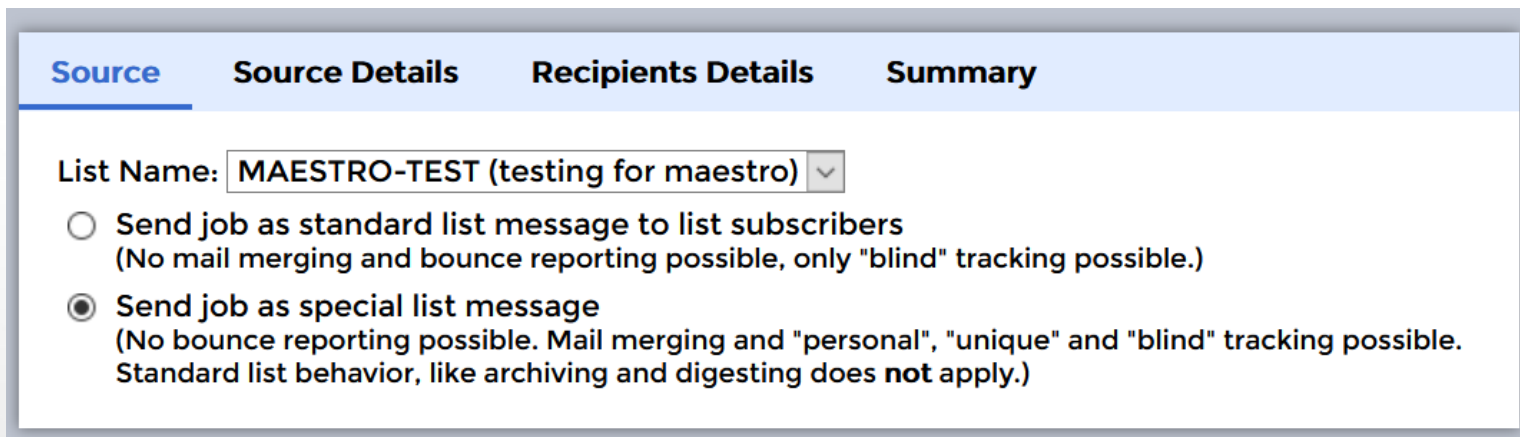

Once selected, you can click **Next**, and make any changes needed under **Advanced Settings**. Click **Finish** on the **Summary** page when you are done to advance to the next step.

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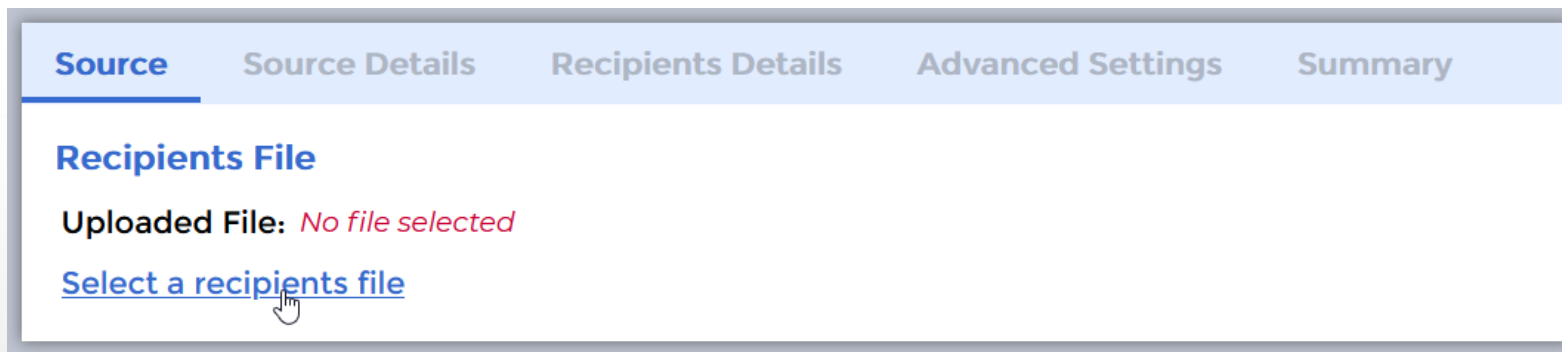
CCS must enable Maestro to send to your LISTSERV list, so if you do not see your list here, please contact ITHelp@uoguelph.ca. Click **Next** and choose any additional settings under **Source** and **Recipient Details**. Once you are finished, click **Finish** to advance to the next step.

Sending to an Uploaded List

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

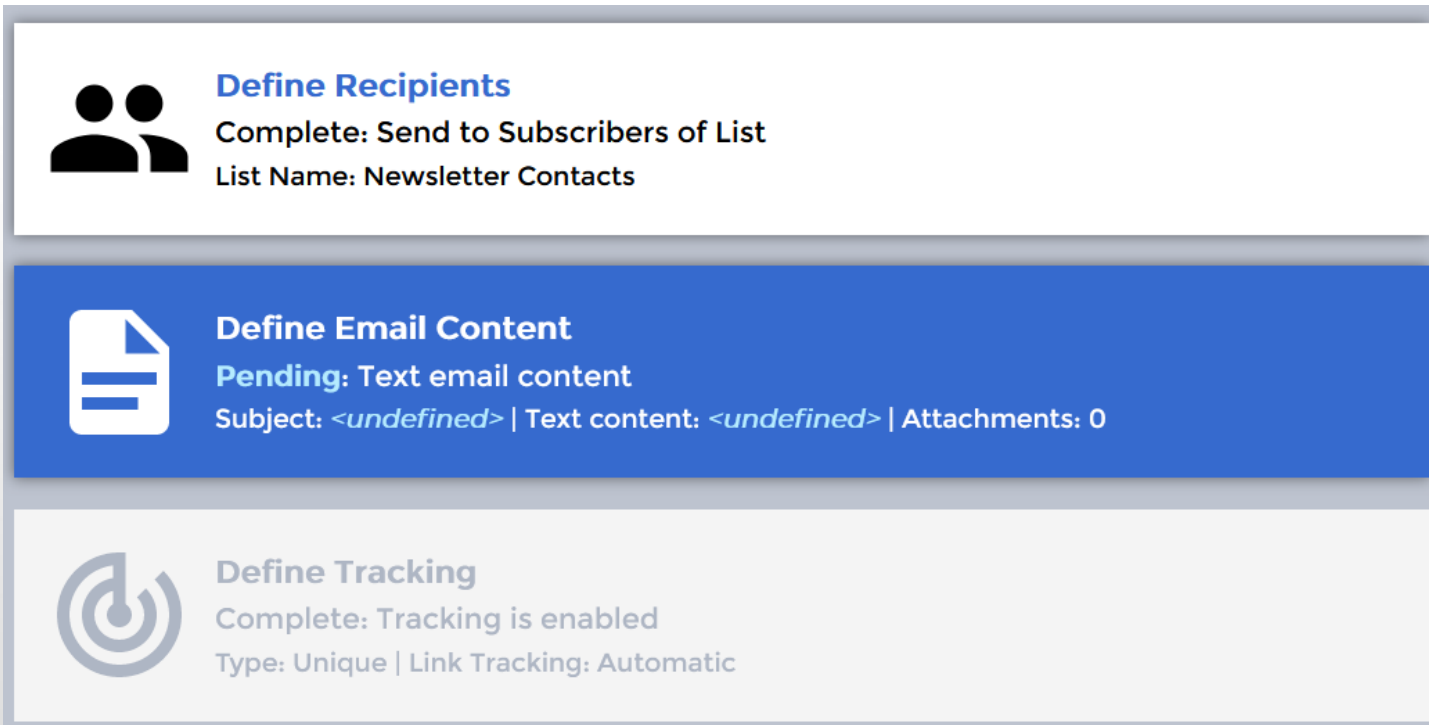Your upload file must contain one column with email addresses in it, but does not require any other information in order to send. Once you have uploaded your file, click **Next** until you reach the **Summary** page, and click **Finish** to advance to the next step.

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.

Define Recipients
Complete: Send to Subscribers of List
List Name: Newsletter Contacts

Define Email Content
Pending: Text email content
Subject: *<undefined>* | Text content: *<undefined>* | Attachments: 0

Define Tracking
Complete: Tracking is enabled
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:

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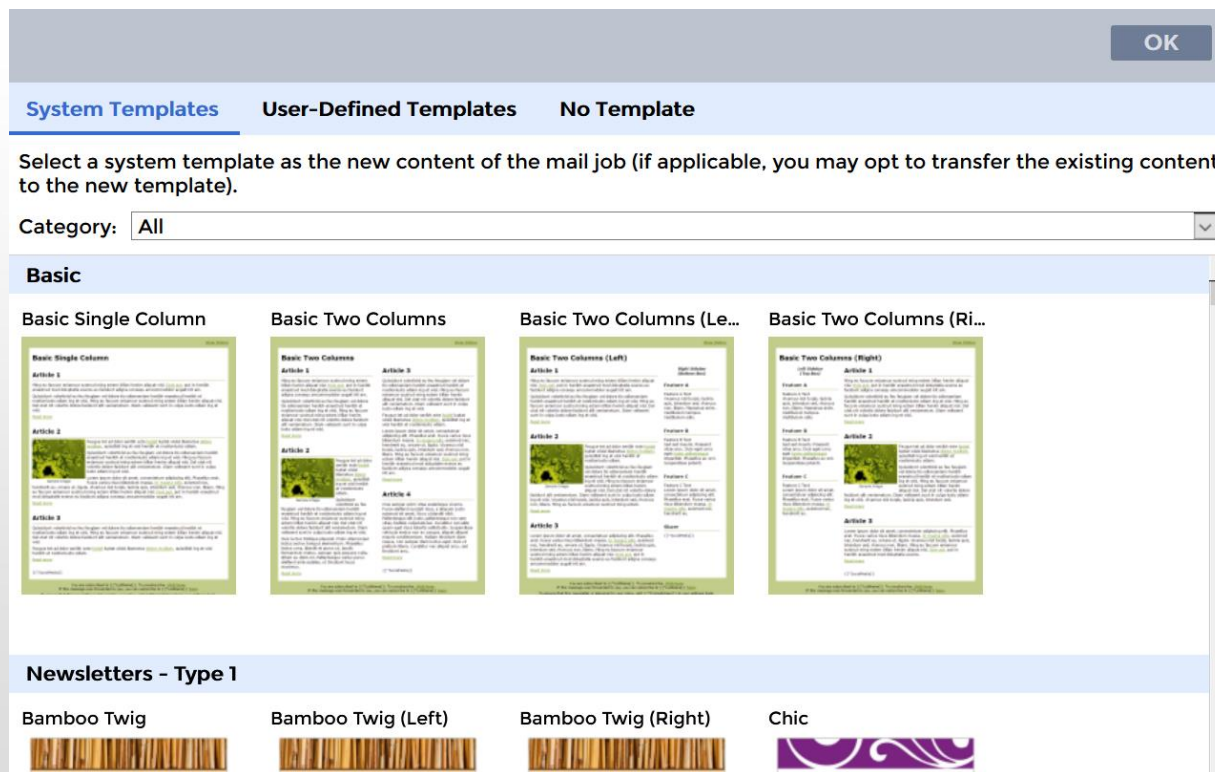
If you have a template set up in Maestro, you will find these under **User-Defined Templates**. Click on the name of the template and select **OK** to start editing it.
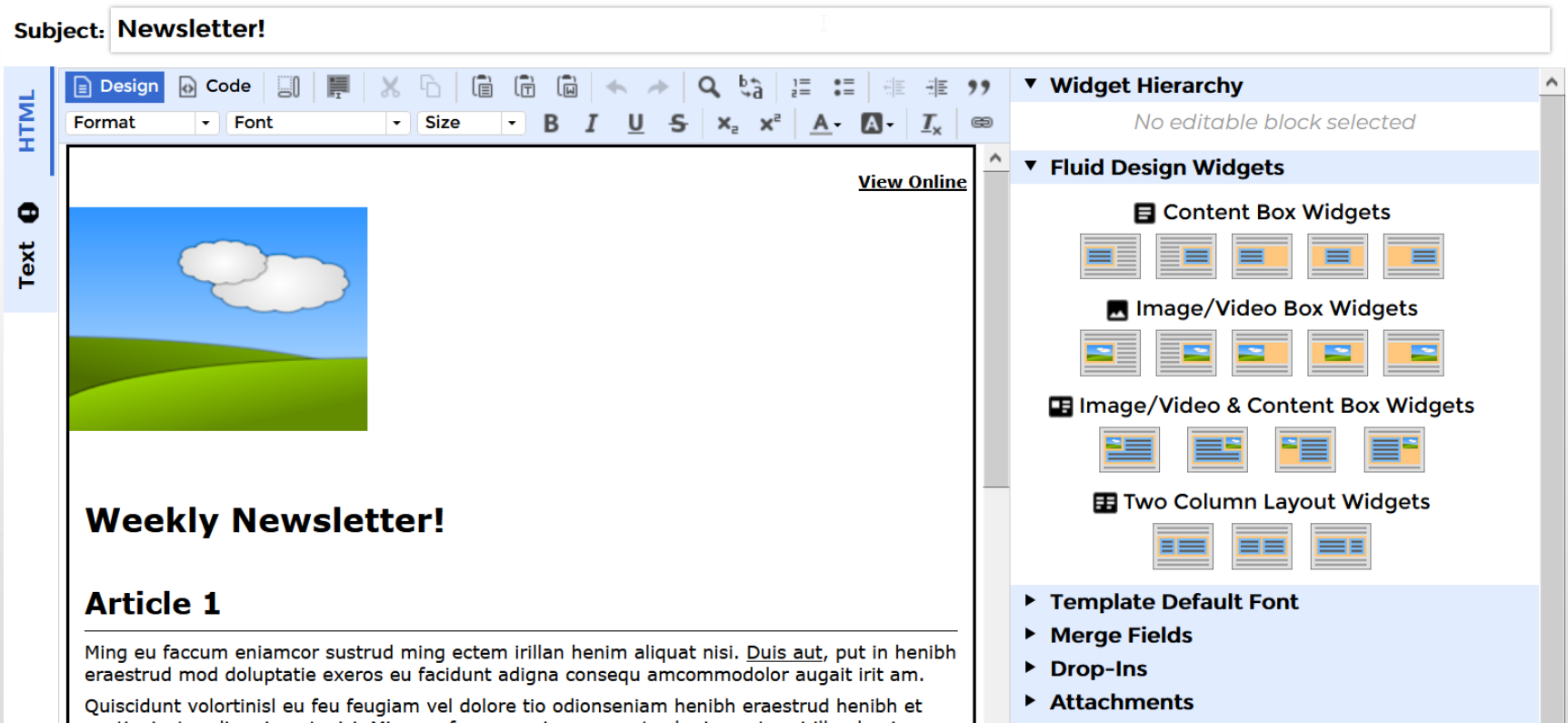
Defining the Email Message

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!

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

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**

    Select File   No File Selected

    No file selected.

○ **External Image Reference**

    URL:

○ **Thumbnail-Link to YouTube Video**

    YouTube Video ID or URL:

    Thumbnail Size: Tiny

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:
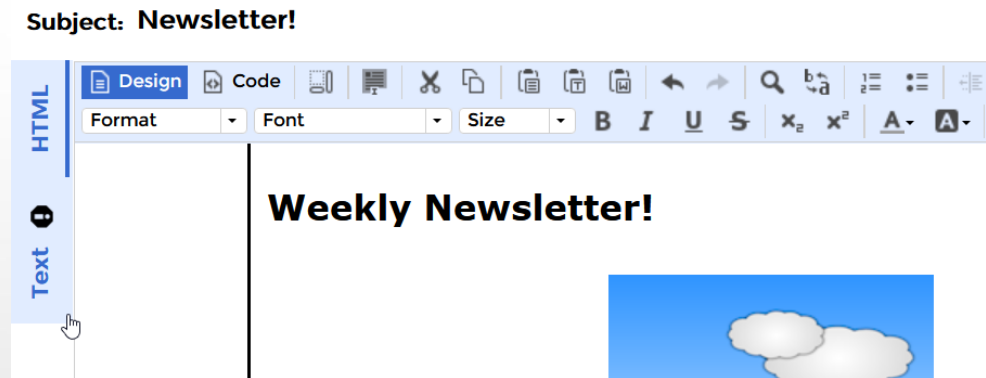
Defining the Email Message

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.
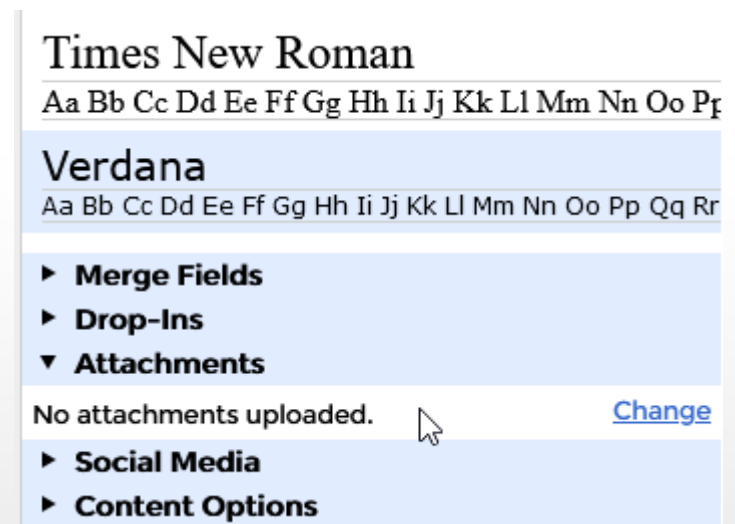
Changing the Job Tracking Type

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.
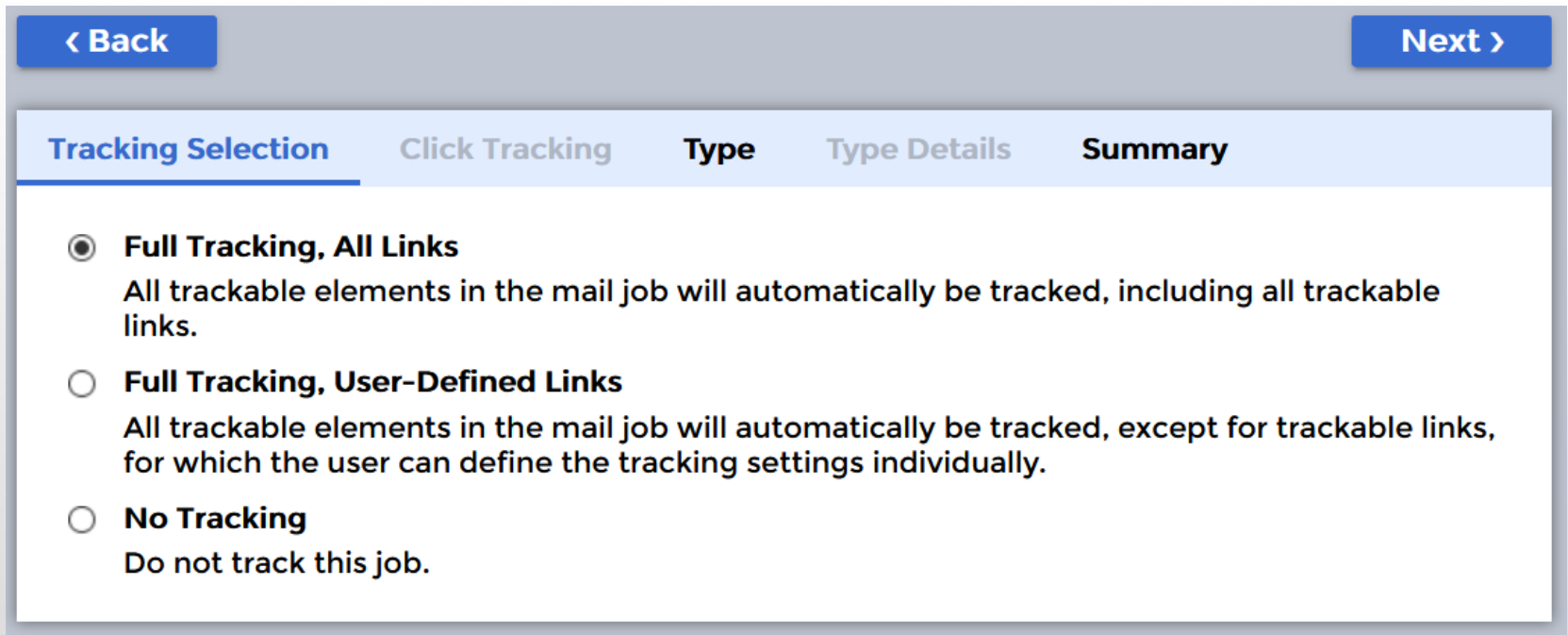
Changing the Job Tracking Type

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:
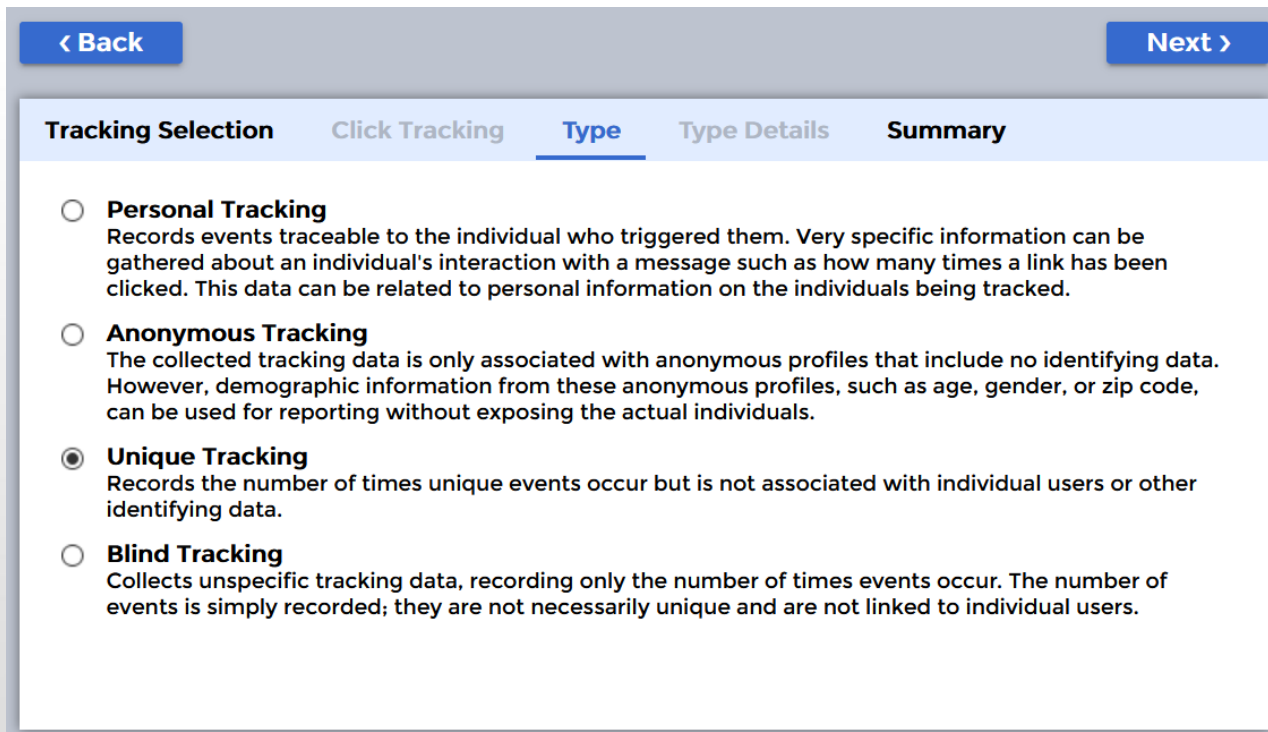
Changing the Job Tracking Type

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:

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.

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:

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: | Newsletter! |
| Test line: | |

(This text is added to each test message)

Add Row	EMAIL
Clear Row	ccs@uoguelph.ca
Clear Row	
Clear Row	

☑ 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.

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.