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 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
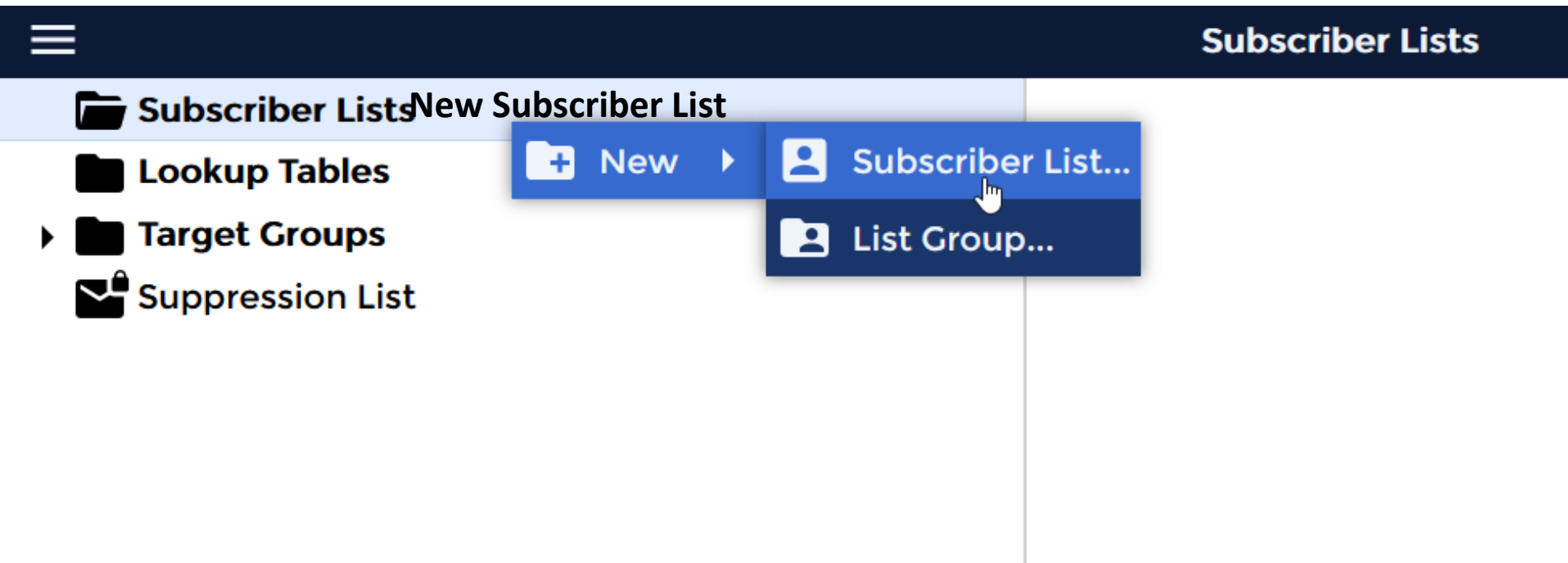
Creating a New List

In Maestro, contact lists for email campaigns are stored under the **Subscriber Warehouse**. To access this area, click on the Menu Stack in the top, left-hand corner of the page and select Subscriber Warehouse
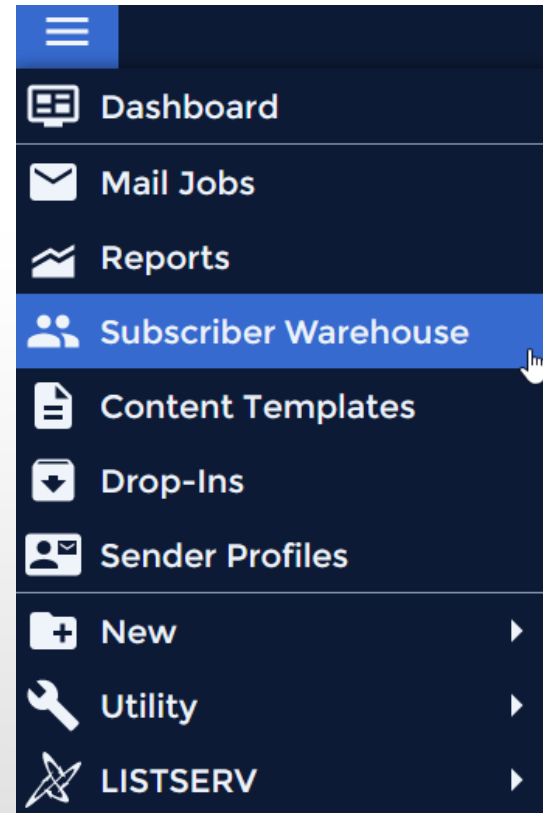
Creating a New List

Once you have accessed the Subscriber Warehouse area, you can right-click on **Subscriber Lists** and select :

General Settings

The first step in creating a new list is giving it a List Name. Then, you will need to select whether your list requires **Explicit Subscription Consent**:
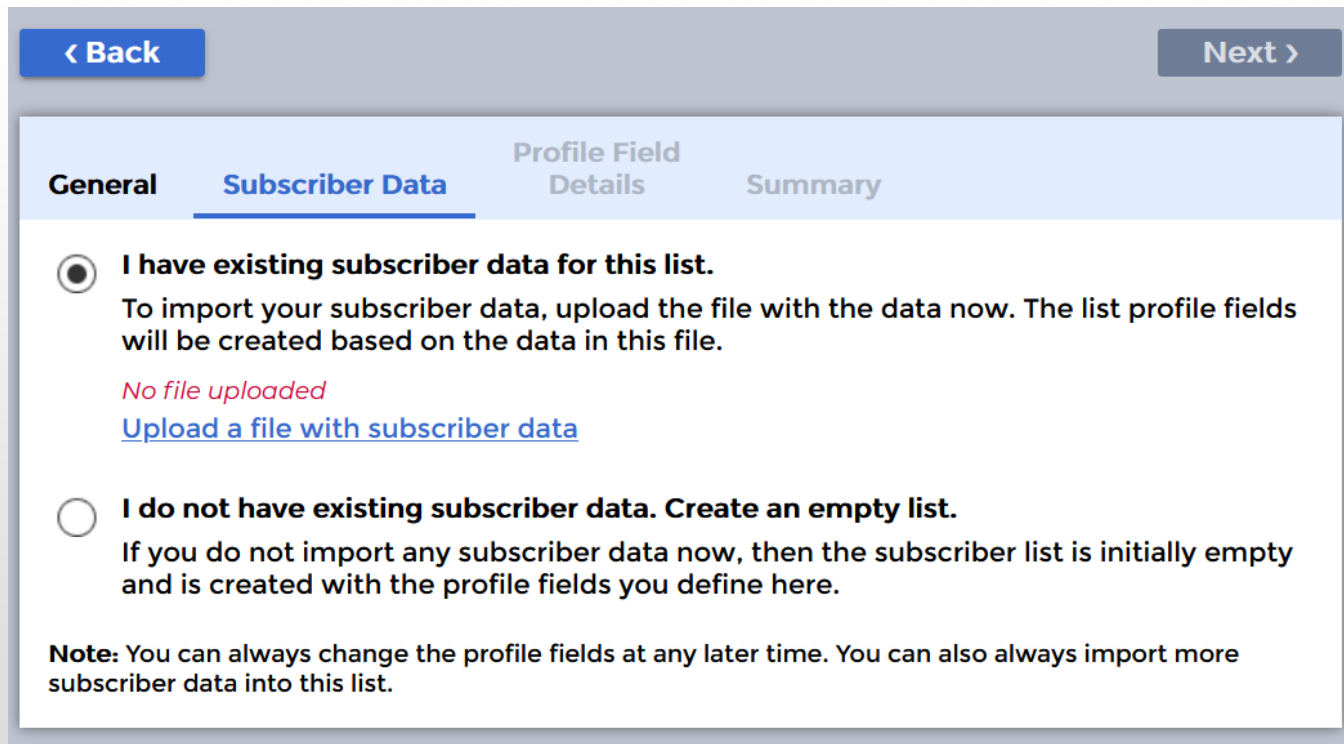
Explicit Subscription Consent

If you are not required by CAN-SPAM rules to request confirmation from your subscribers that they consent to being added to your list, you can select No for this option.

If your list is opt-in only, or you are sending marking emails to external subscribers, you may be required to include this step. Contact Communications and Public Affairs if you are not sure!

Subscriber Data

The next step is to select the fields that you wish to include in your contact list. If you have a CSV file you are uploading, the first option will use the column headings to create the fields.

Subscriber Data

Selecting the second option will allow you to set up the list and manually specify what fields will be present for each contact but upload the contacts themselves later. We will use the first option:

Subscriber Data

If you choose to upload a CSV or Excel file, the next step will take you to a file picker which you can select your spreadsheet. Do not change the encoding, as this could cause issues with the import. Click **Upload** when you are ready:

Subscriber Data

This step will take you back to the Subscriber Data page, and you can click next to upload your spreadsheet of contacts into Maestro and finish your list:

File Columns

Maestro will then ask whether the fields in your contact list are Optional or Mandatory, and which field represents the email address:

LISTSERV Maestro has analyzed the data in the uploaded file and has determined suggestions for the field settings.

Please review the suggestions for the field settings ⚠

First Name	Last Name	Email	Department	Code
Text ∨	Text ∨	Email Address ∨	Text ∨	Number ∨
Optional ∨	Optional ∨	Mandatory ∨	Optional ∨	Optional ∨
Name: First N	Name: Last Na	Name: Email	Name: Departme	Name: Code
Jeff	Smith	test1@uoguelph.ca	Math	2
Jane	Foster	test2@uoguelph.ca	Math	2

File Column Details

For fields that are **Optional**, Maestro will allow for blank inputs. You must specify how Maestro will handle blank entries in a **Mandatory** field:

Define how LISTSERV Maestro handles rows in the uploaded file where a value is missing for the corresponding column. Click on the column name to change how missing values are handled for this column.

Column	Handling of Missing Values
First Name	*<Reject row with missing value>*
Last Name	*<Reject row with missing value>*
Department	*<Use empty value>*
Code	*<Use empty value>*

Finishing The List

Your list is now ready for use and can be added as a Recipient to new Mail Jobs in Maestro!

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, and CCS will assist with this process.

Uploading Contacts from a CSV File

To get started, right-click on your **Contact List** and select **Import Subscribers**
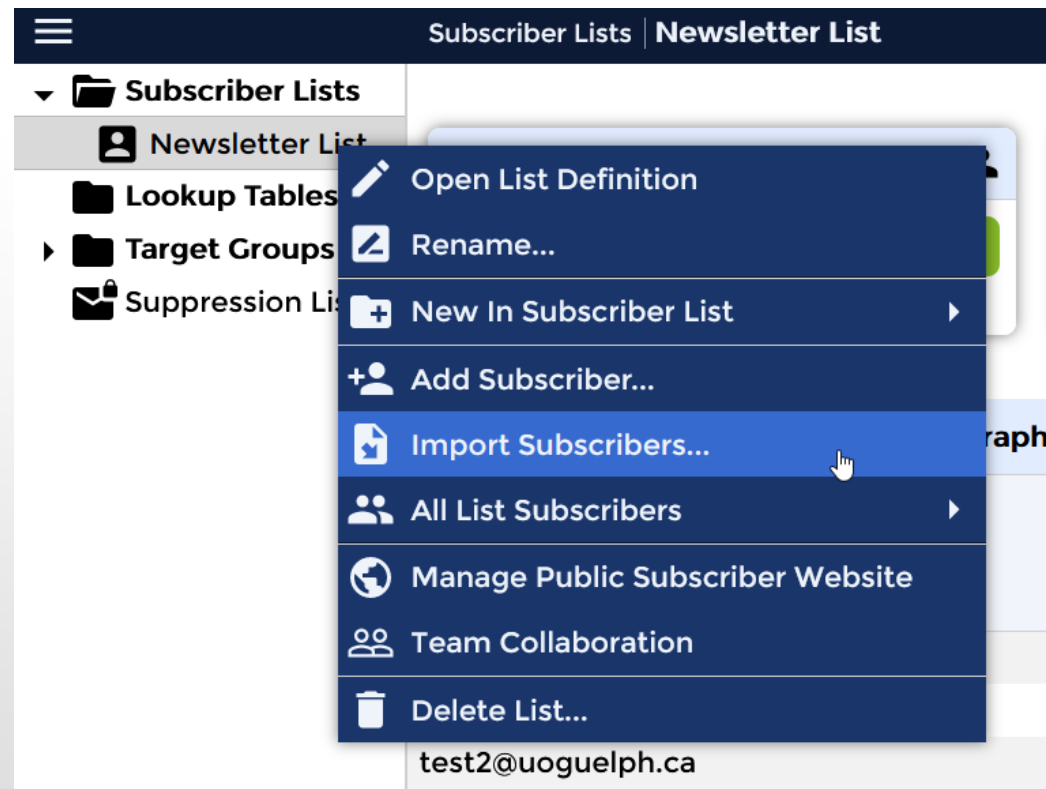
Import Type

There are several ways you can import subscribers to your list. For this example, we will choose **Add to list**, which will simply add any new contacts and ignore duplicates or contacts already on our list:

Source

To import your list from a file, click on the "**Upload a file with subscriber data**" link and choose the Excel or CSV file you wish to import. Then click Next:

Parse Details

Just like creating a new list, Maestro needs to know if your source file has a Header row, or if you will be manually specifying the field names:

Map Fields

Maestro will attempt to discern which columns in your file map to the fields in your contact list. For any fields that it was not able to automatically detect, you will need to manually select them from the drop-down:

Mapping Details

In the second-last step, if you have correctly mapped your fields you will see all fields listed with no errors:

Define how missing values are handled. Missing values occur if a field is not mapped to a column in the uploaded file or if there are rows in the file where a value is missing in the corresponding column. Click on the column name to change how missing values are handled for this column.

Column	Handling of Missing Values
FIRST_NAME	<Reject row with missing value>
LAST_NAME	<Reject row with missing value>
DEPARTMENT	<Use empty value>
CODE	<Use empty value>

Launching the Import

If everything is set up correctly, your last step is to click **Launch** and launch the uploader to import your contacts!

Summary

Once the import is complete, you will see a summary of all imported contacts, and any errors that occurred while importing your list. Click **OK** to start using your updated list!

Adding a Single Subscriber

Here you can fill in any necessary field details for a single subscriber and select **OK** to add this person to your list:

OK

This adds a new subscriber to the selected list.

Please supply the values for the subscriber that you want to add to the list:

Email*: test6@uoguelph.ca

First Name*: Freddy

Last Name*: Marshall

Department: Anthropology

Code: 1

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 or Ext. 58888 and your message will be directed to the appropriate team.

UNIVERSITY of GUELPH

COMPUTING AND COMMUNICATIONS SERVICES