



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.

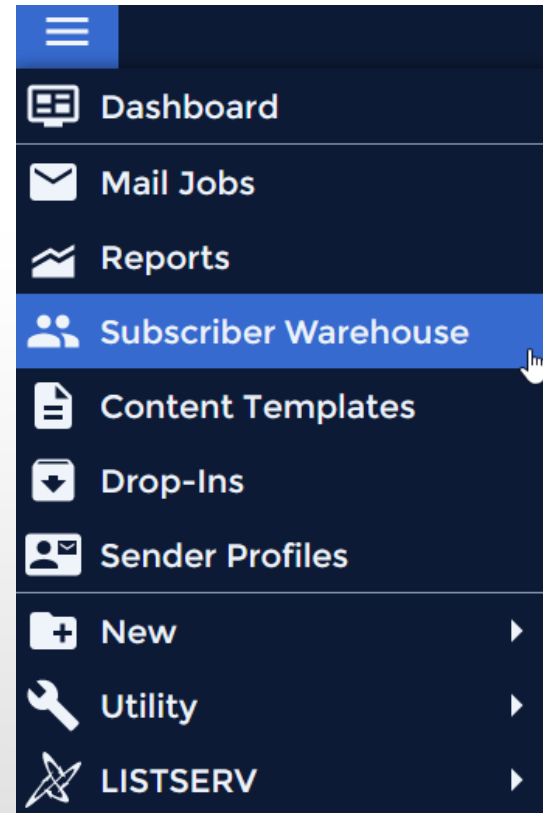
If you wish to create a subscriber list that connects to an LDAP or Active Directory system, please contact IThelp@uoguelph.ca and CCS can help you set this up!

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

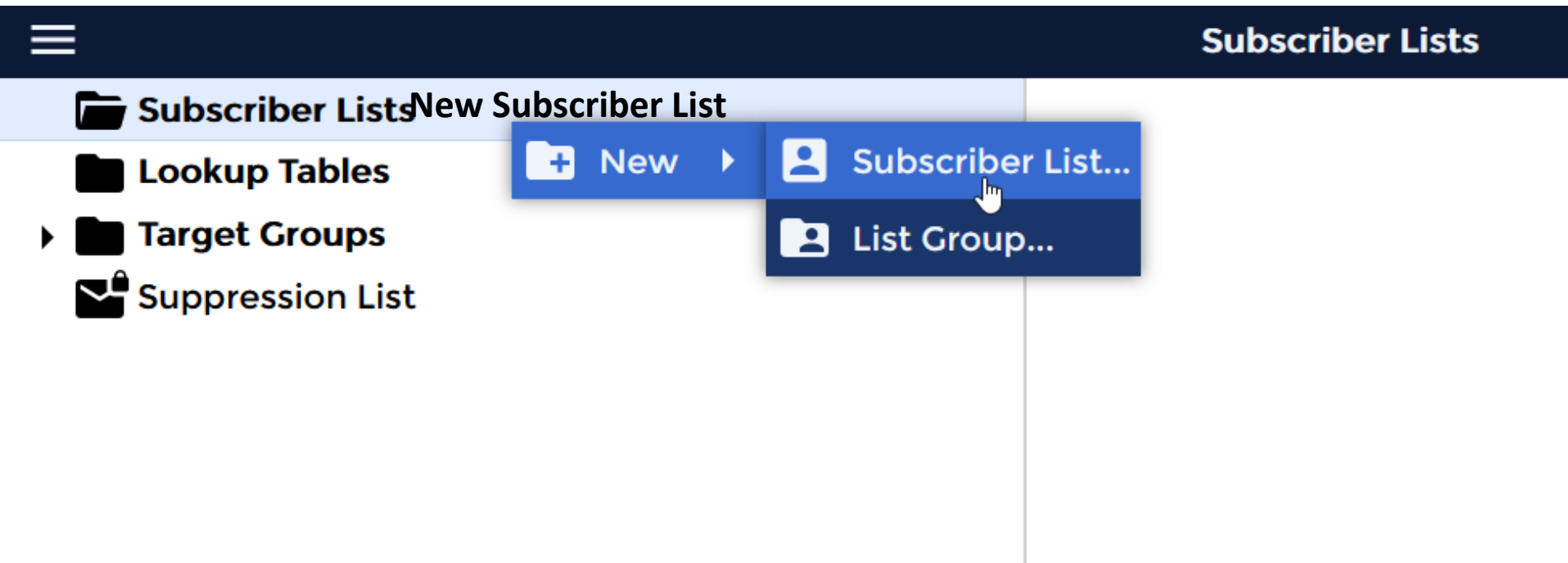
Creating a New List

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**:

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General **Subscriber Data** Profile Field Details Summary

List Name:

Explicit Subscription Consent

Asking list subscribers explicitly to accept the list subscription terms is a good practice and is often required by data protection regulations. To assist you in complying with such regulations, LISTSERV Maestro allows you to add an additional input field specifically for this purpose.

No, do not explicitly ask subscribers to accept any terms.

Yes, include an additional input field to ask subscribers to accept the list's subscription terms, as specified here.

[Show Advanced Settings](#)

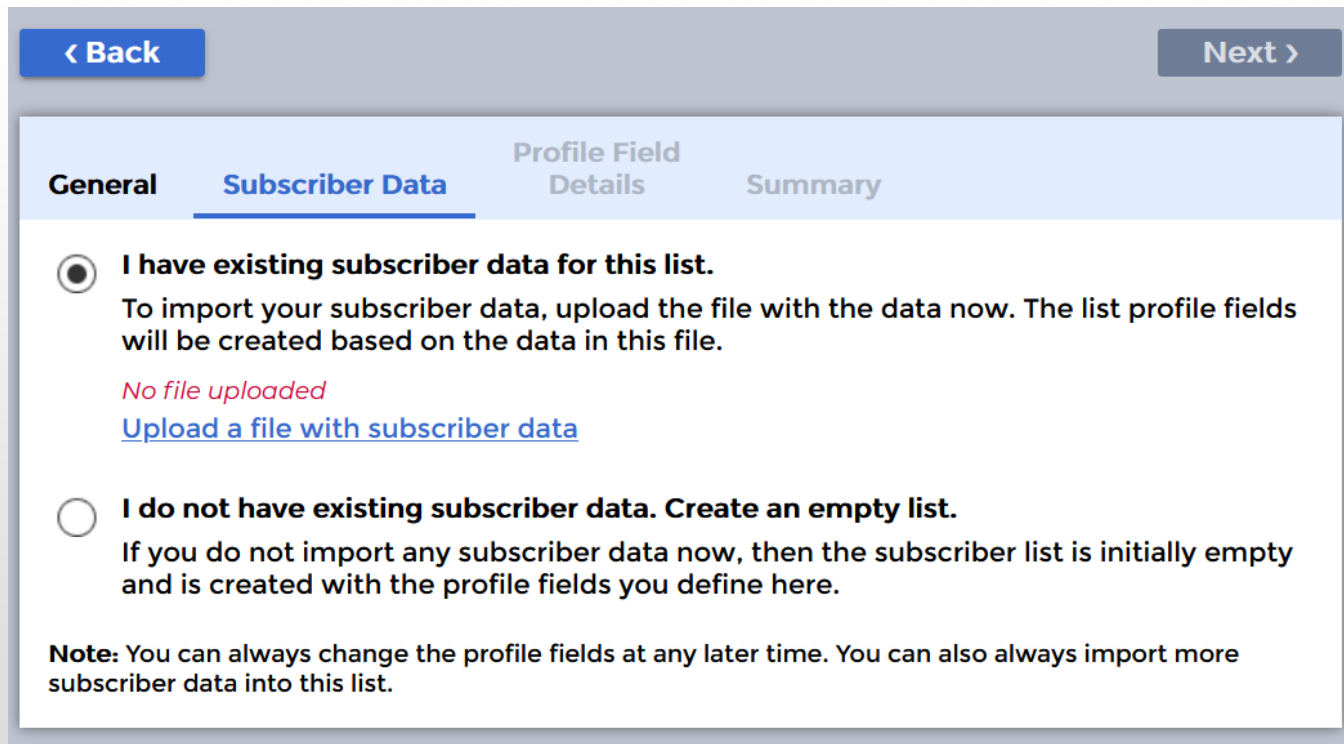
Explicit Subscription Consent

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 marketing 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.



The screenshot shows a web interface with a navigation bar at the top containing a blue button labeled '< Back' on the left and a grey button labeled 'Next >' on the right. Below the navigation bar is a tabbed interface with four tabs: 'General', 'Subscriber Data', 'Profile Field Details', and 'Summary'. The 'Subscriber Data' tab is currently selected and underlined. The main content area contains two radio button options. The first option is selected, indicated by a filled radio button. The second option is unselected, indicated by an empty radio button. Below the first option, there is a red text message 'No file uploaded' and a blue hyperlink 'Upload a file with subscriber data'. At the bottom of the content area, there is a 'Note' section.

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General Subscriber Data Profile Field Details Summary

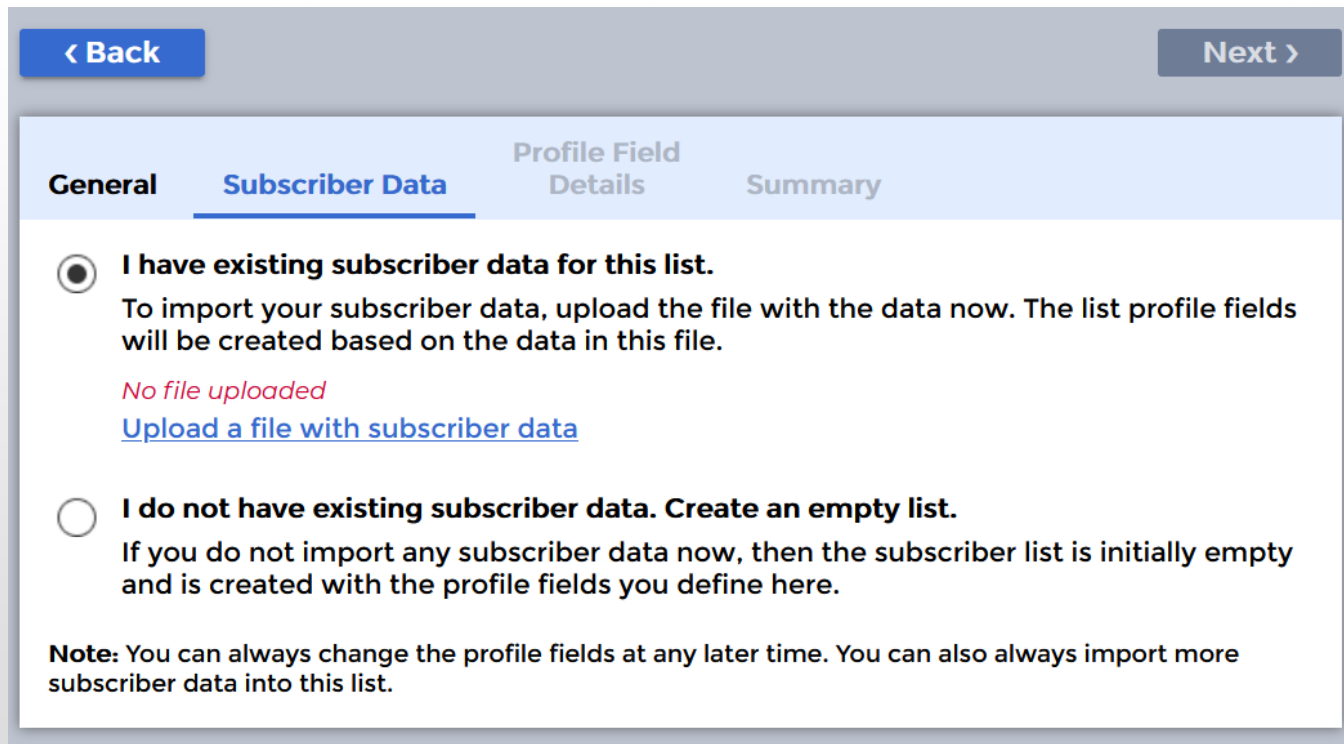
I have existing subscriber data for this list.
To import your subscriber data, upload the file with the data now. The list profile fields will be created based on the data in this file.
No file uploaded
[Upload a file with subscriber data](#)

I do not have existing subscriber data. Create an empty list.
If you do not import any subscriber data now, then the subscriber list is initially empty and is created with the profile fields you define here.

Note: You can always change the profile fields at any later time. You can also always import more subscriber data into this list.

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:



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General **Subscriber Data** Profile Field Details Summary

I have existing subscriber data for this list.
To import your subscriber data, upload the file with the data now. The list profile fields will be created based on the data in this file.
No file uploaded
[Upload a file with subscriber data](#)

I do not have existing subscriber data. Create an empty list.
If you do not import any subscriber data now, then the subscriber list is initially empty and is created with the profile fields you define here.

Note: You can always change the profile fields at any later time. You can also always import more subscriber data into this list.

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:

Upload

Please select the file with the subscriber data that you want to import.

The uploaded file must either be an Excel or OpenOffice **spreadsheet** file (".xls", ".xlsx" or ".ods"), or a text file in **CSV format** (=comma separated values). CSV is a text format that uses a special character (usually comma, semicolon or tab) as a separator between values. [More about CSV files.](#)

File Name: contacts.csv

Encoding: ▼

[Click here for help with selecting the correct encoding](#)

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:

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Next >

General

Subscriber Data

Profile Field
Details

Summary



I have existing subscriber data for this list.

To import your subscriber data, upload the file with the data now. The list profile fields will be created based on the data in this file.

Source File: contacts.csv

[Upload a different file](#)



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
<input type="text" value="Text"/>	<input type="text" value="Text"/>	<input type="text" value="Email Address"/>	<input type="text" value="Text"/>	<input type="text" value="Number"/>
<input type="text" value="Optional"/>	<input type="text" value="Optional"/>	<input type="text" value="Mandatory"/>	<input type="text" value="Optional"/>	<input type="text" value="Optional"/>
Name: <input type="text" value="First N"/>	Name: <input type="text" value="Last N"/>	Name: <input type="text" value="Email"/>	Name: <input type="text" value="Departme"/>	Name: <input type="text" value="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!

Subscriber Lists | Newsletter List spencelj (ccs-test) ? [Open to everyone]

List Size

3	+3	+3
Now	Last 24hrs	Last Week

Last Week

+0	-0	-0
Subscribes	Unsubscribes	Cleanups

(Adds/Removes by list)

Subscribers | Statistics | Demographics

Activity:

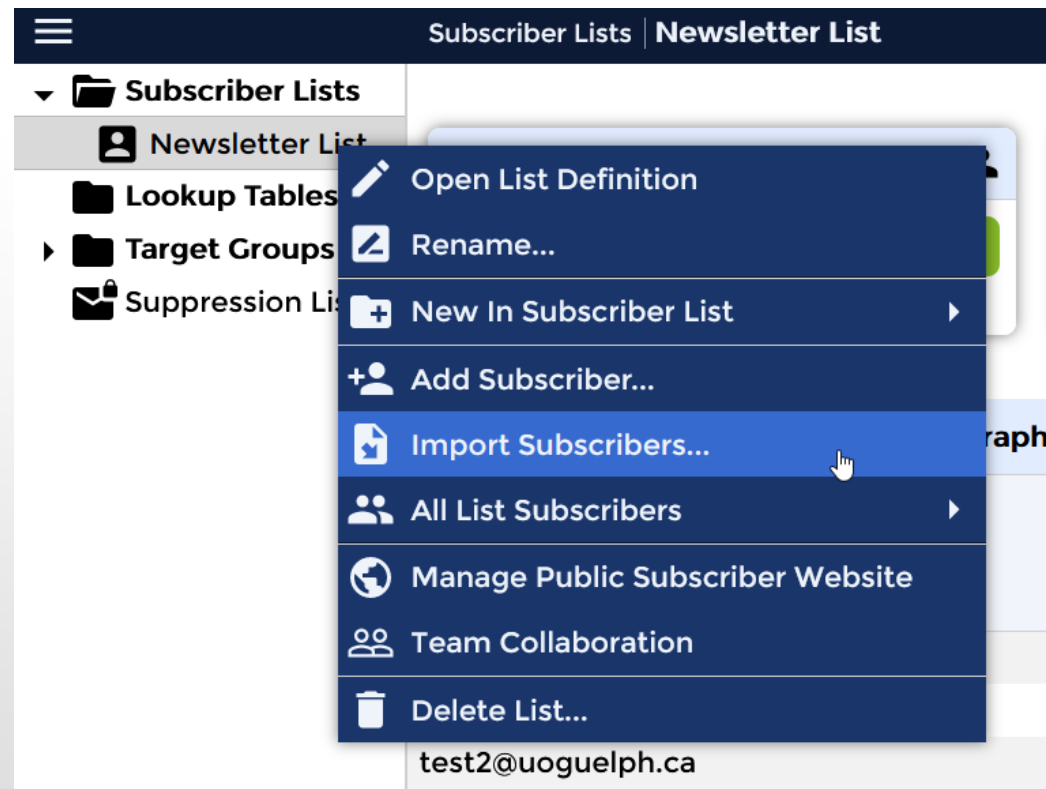
EMAIL	FIRST_NAME	LAST_NAME	DEPARTMENT	CODE	Subs
Test4@uoguelph.ca	Harry	James	Stats	2	Dec.
test1@uoguelph.ca	Jeff	Smith	Math	2	Dec.
test2@uoguelph.ca	Jane	Foster	Math	2	Dec.

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:

Type Type Details Source Parse Details Map Fields Mapping Details Launch Import

The imported data can be used to modify the subscribers of the list (including the values for shared list group 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

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:

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Next >

Type

Type Details

Source

Parse Details

Map Fields

Mapping
Details

Launch Import

- Import list subscribers from a file
- Import list subscribers from a database or LDAP directory


Source File: contacts2.csv

[Upload a different file](#)

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:

Type **Type Details** **Source** **Parse Details** **Map Fields** **Mapping Details** **Launch Import**

File "contacts2.csv" uploaded successfully, please review the parse results 

LISTSERV Maestro has parsed the uploaded file "contacts2.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 **Refresh Preview**

First Name	Last Name	Email	Department	Code
Lucy	Griswald	test5@uoguelph.ca	Stats	2

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:

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 ✓ FIRST_NAME ✓ LAST_NAME ↻

Optional fields: DEPARTMENT ✓ CODE ✓

First Name	Last Name	Email	Department	Code
FIRST_NAME	<ignore>	EMAIL	DEPARTMENT	CODE
Lucy	<ignore>	test5@uoguelph.ca	Stats	2
↻ field not mapped ·	EMAIL	field mapped to more than one file column		
	FIRST_NAME			
	LAST_NAME			
	DEPARTMENT			

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!

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[Launch](#)

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

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

Upload Options

Modification Type: Add to List

Import List Subscribers From a File

Source File: contacts2.csv

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!

OK

List Subscribers File

Source File: contacts2.csv

Total number of rows: 1

Upload Options

Modification Type: Add to List

Results



All uploaded rows have been processed successfully.

Subscribers added to the list: 1

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*:	<input type="text" value="test6@uoguelph.ca"/>
First Name*:	<input type="text" value="Freddy"/>
Last Name*:	<input type="text" value="Marshall"/>
Department:	<input type="text" value="Anthropology"/>
Code:	<input type="text" value="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.