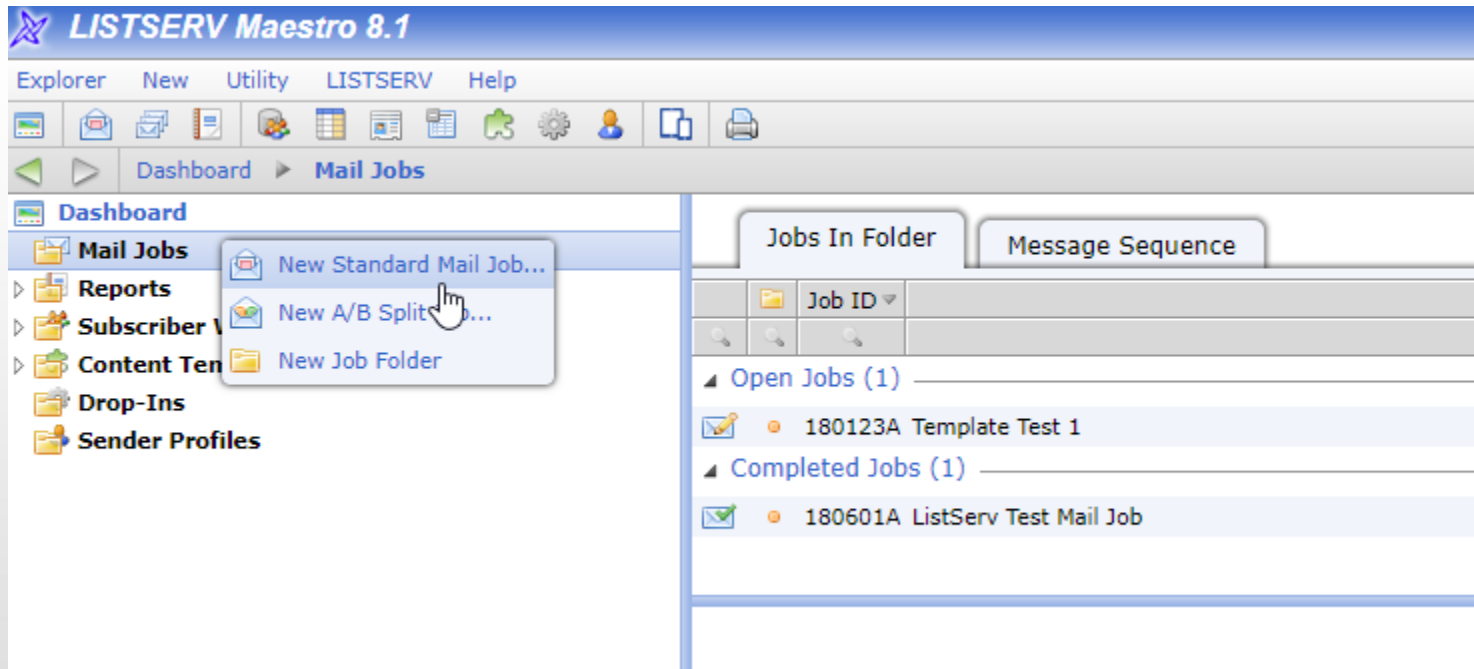


# Creating an Email in Maestro

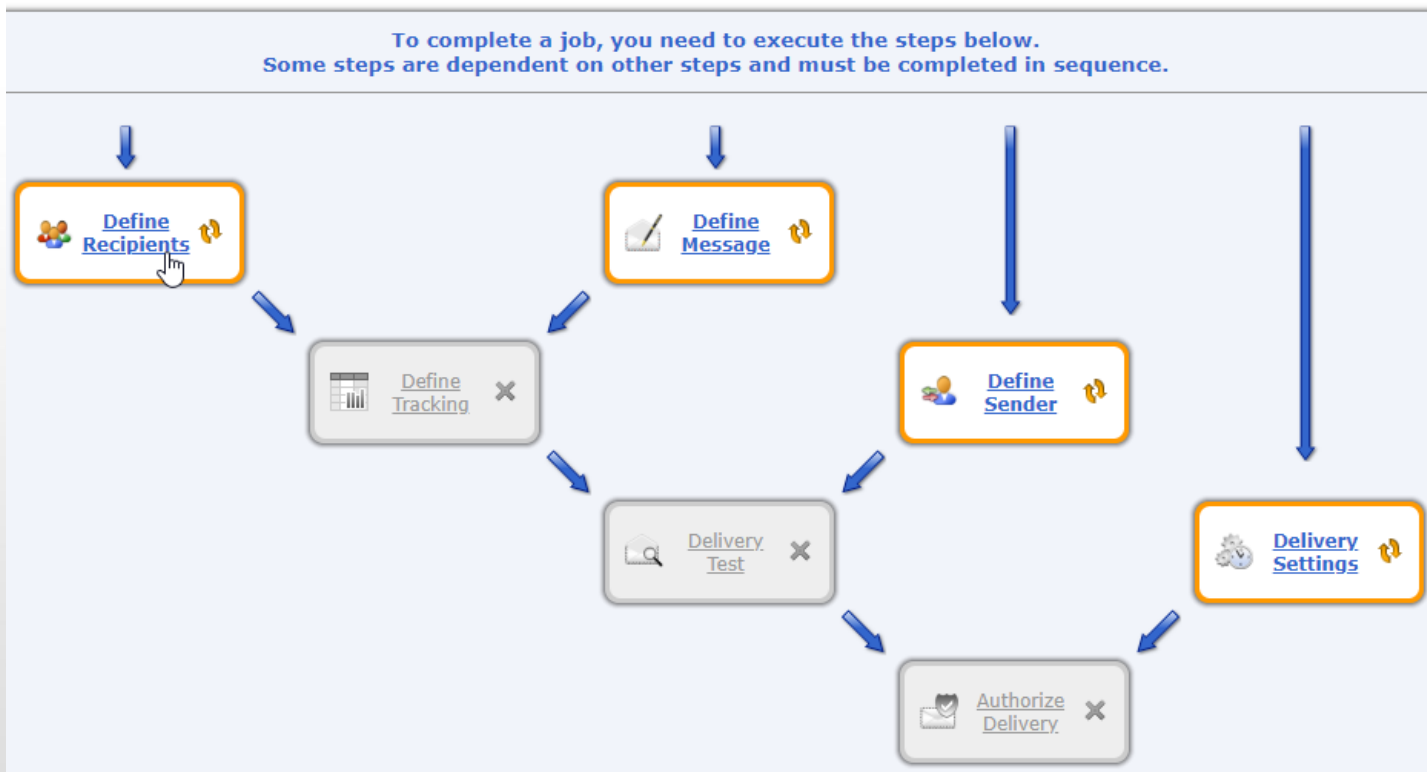
# Creating the Email Message

After logging into Maestro, the first thing you'll want to do is create a new Mail Job. You can do this by right-clicking on the **Mail Jobs** heading on the left-hand side, and selecting **New 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




Maestro allows you to send an email through a number of different channels, from a ListServ list to a database query.

## *Options*



### Use Existing Recipients

-  Send to a Recipient Target Group
-  Send to a List or Dataset in the Subscriber Warehouse
-  Send to a Classic LISTSERV List

### Define New Recipients

-  Upload Recipients
-  Select Recipients from a Database or LDAP Directory
-  Let LISTSERV Select Recipients from a Database or LDAP Directory

### Advanced Options

-  Determine Recipients Based on the Reaction on a Previous Job
-  Copy Recipients Definition from Job:

-- Select --

# Define the Recipients for Your Email

- The most common sending options used at the University are:
  - **Send to a List or Dataset in the Subscriber Warehouse** – 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 an LDAP List

- If you selected **Send to a List or Dataset in the Subscriber Warehouse**, click **Next** and you will see the option to select your list

**Recipients Source: Send to Subscriber List or Dataset**

Select the subscriber list or dataset to retrieve your recipients from.

<p>Subscriber Datasets</p> <ul style="list-style-type: none"><li>LDAP Test<ul style="list-style-type: none"><li>LDAP Test</li><li><b>All List Subscribers</b></li><li>Advanced Recipient Selection</li></ul></li><li>Subscriber List Test</li></ul>	<p><b>List or Dataset Details</b></p> <p>Name: LDAP Test</p> <p>Description: LDAP Test List</p> <p>Selected Segment: &lt;No Segment Selected&gt;</p> <p>Segment Condition: All active list subscribers</p>
---	--

Click down to the lowest level in the list hierarchy and select All List Subscribers. From here, 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 **Next** and you will be prompted to select the LISTSERV List you wish to send to:

*Recipients Source: Send to Classic LISTSERV List*

Information about the currently selected LISTSERV list.

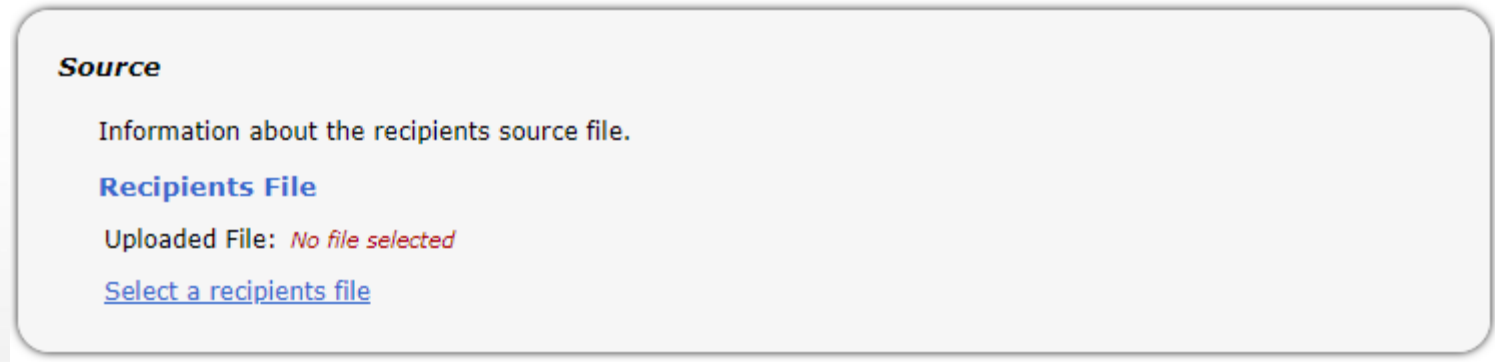
List Name:

- 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](mailto: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 **Next** and you will be prompted to upload a file:



The screenshot shows a light gray rounded rectangular box containing the following text:

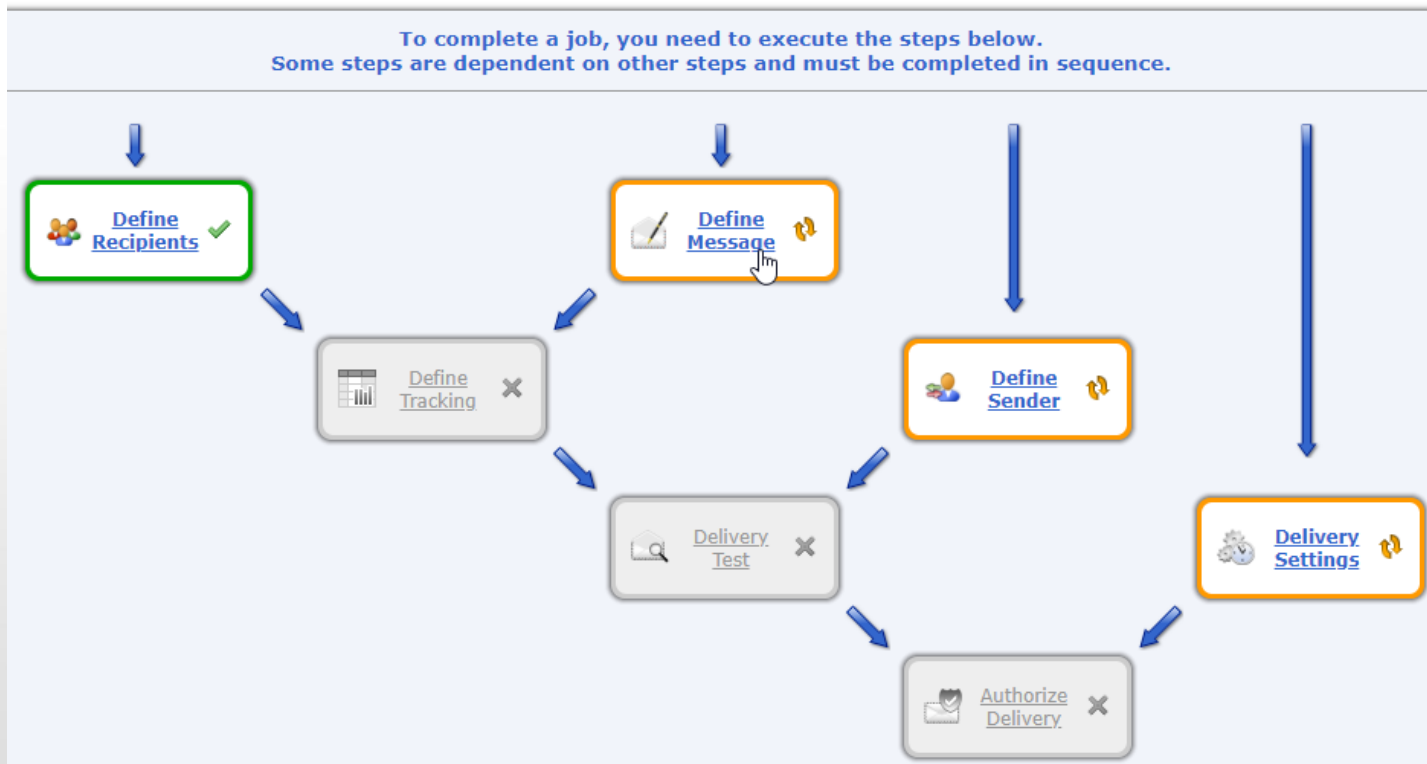
- Source**
- Information about the recipients source file.
- Recipients File**
- Uploaded File: *No file selected*
- [Select a recipients file](#)

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.



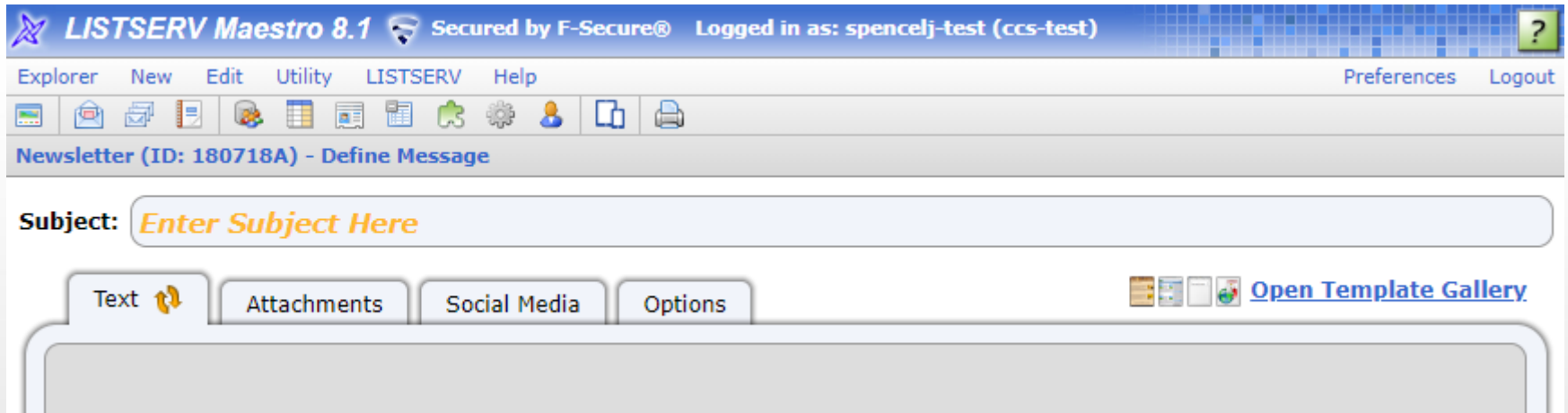
# Defining the Email Message

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



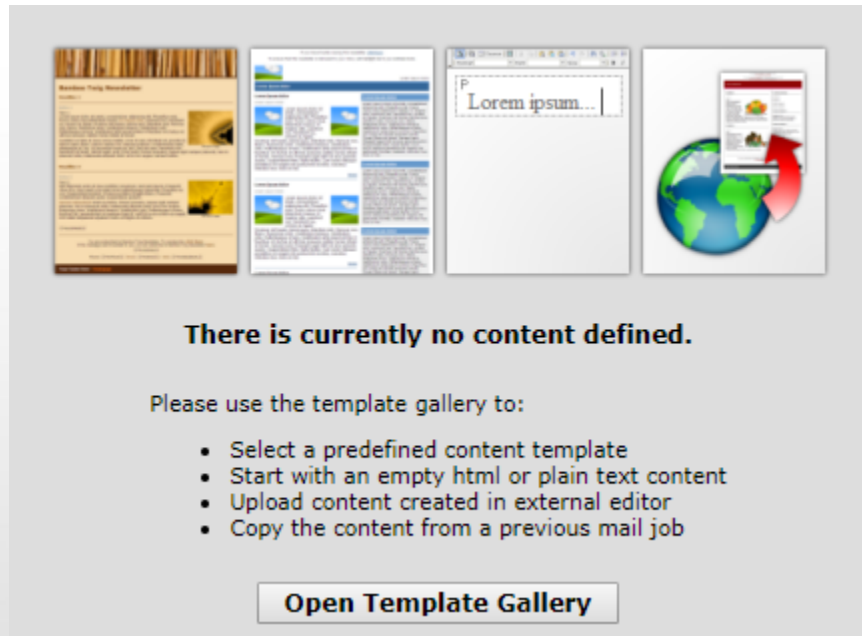
# Defining the Email Message

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.



The screenshot shows a web-based email composition interface. At the top, there are four preview thumbnails: a newsletter-style layout, a multi-column layout with images, a simple text layout with 'Lorem ipsum...' text, and a globe with a red arrow. Below these is a message body area with a warning message: 'There is currently no content defined.' Below the warning, it says 'Please use the template gallery to:' followed by a bulleted list of instructions. At the bottom of the message body area is a button labeled 'Open Template Gallery'.

**There is currently no content defined.**

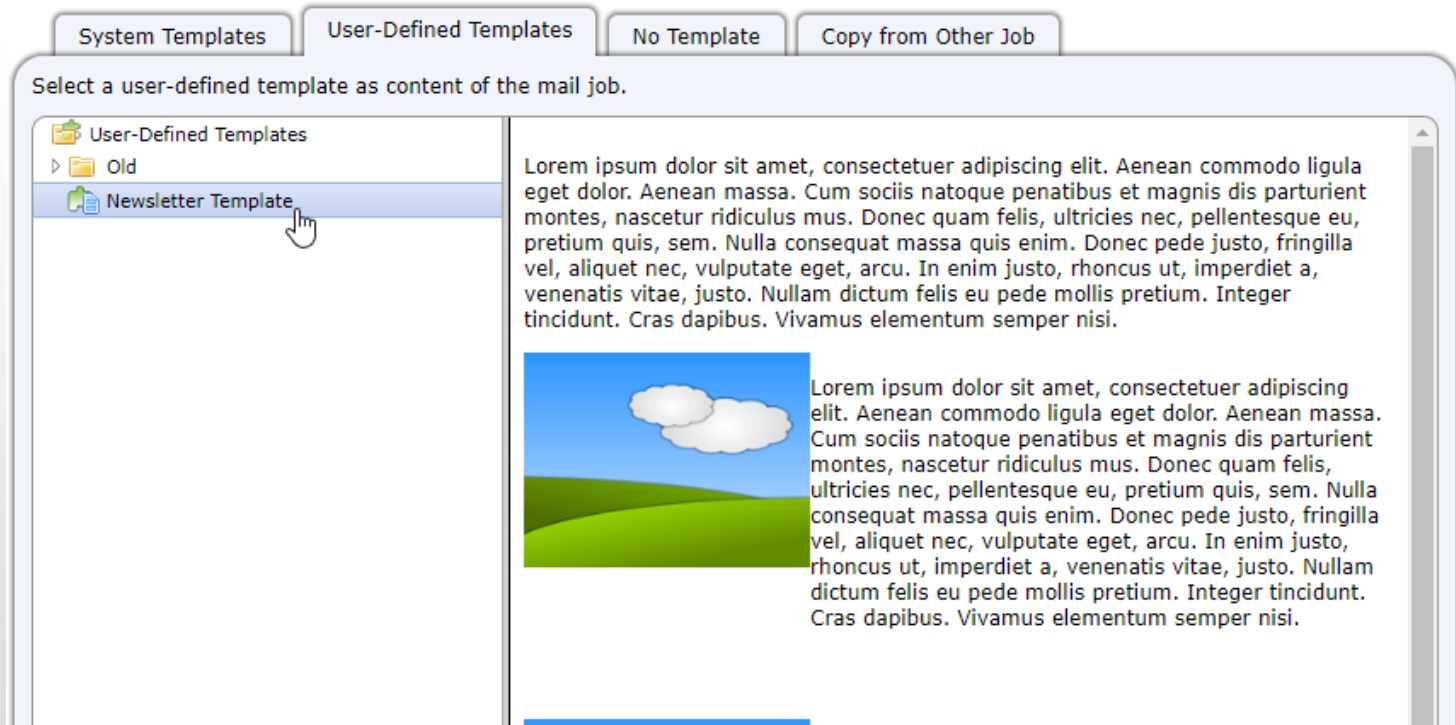
Please use the template gallery to:

- Select a predefined content template
- Start with an empty html or plain text content
- Upload content created in external editor
- Copy the content from a previous mail job

**Open Template Gallery**

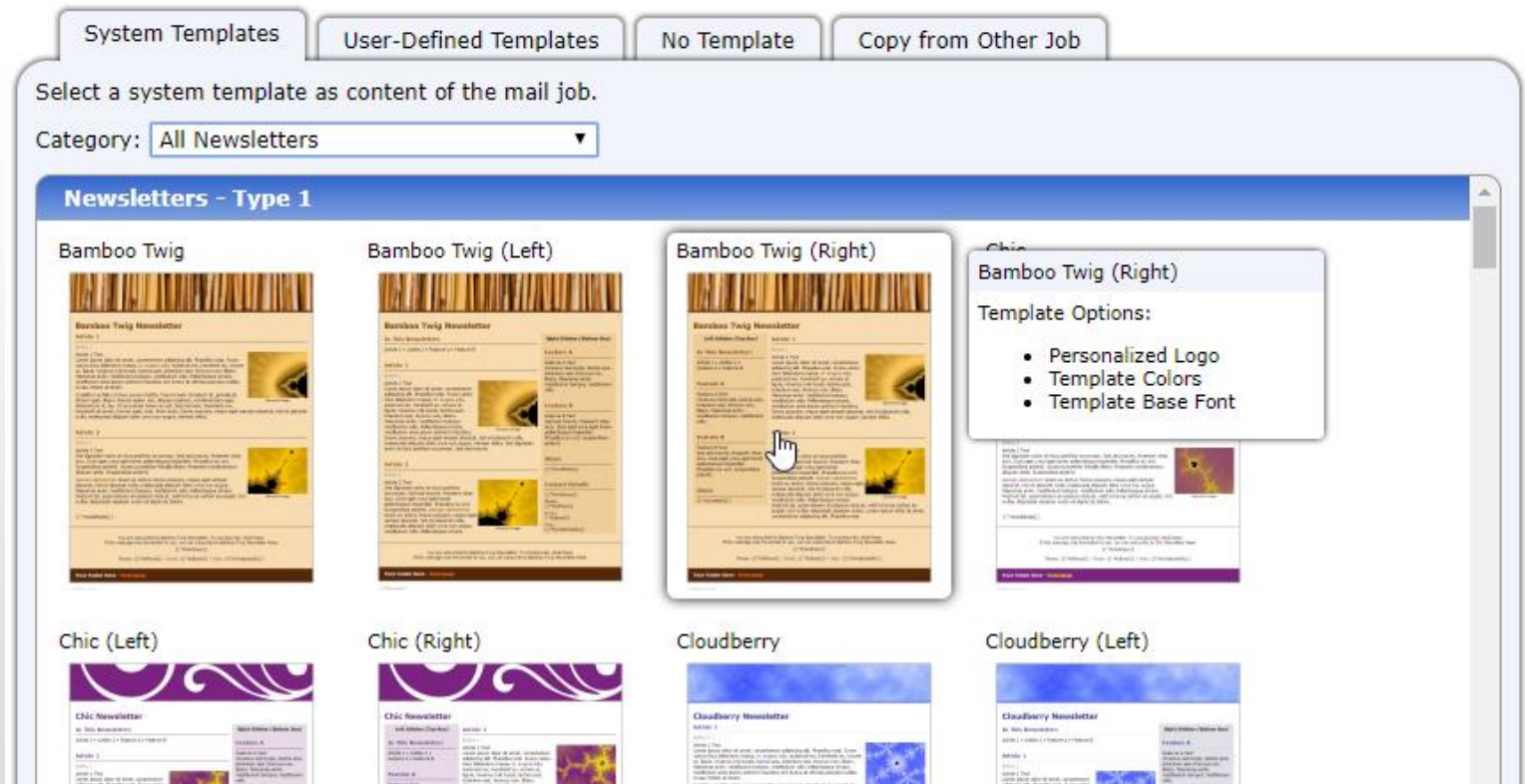
# Defining the Email Message

If you have a template that CCS has helped migrate to Maestro, or if you have created a template yourself in Maestro, you will find these under **User-Defined Templates**. Click on the name of the template, and select **OK** to start editing it.



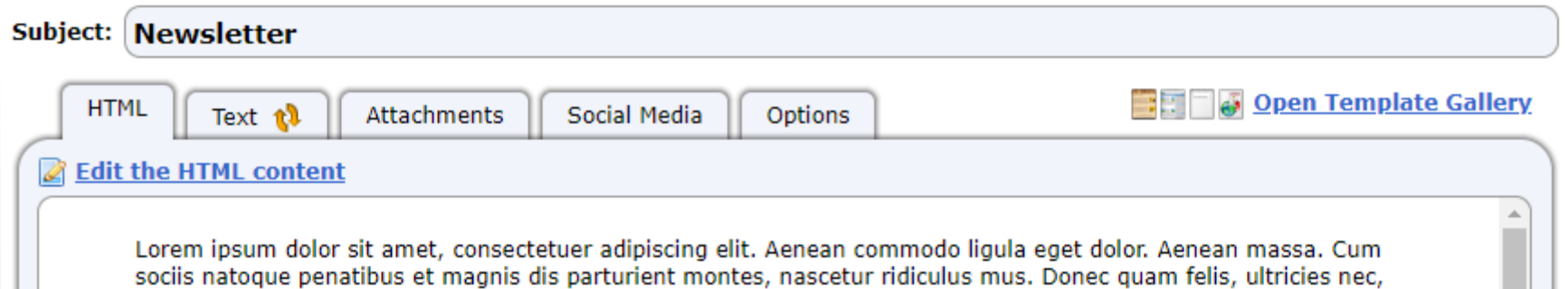
# Defining the Email Message

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



# Defining the Email Message

Once you have selected your template, click on **Edit the HTML content** to start creating your email message.

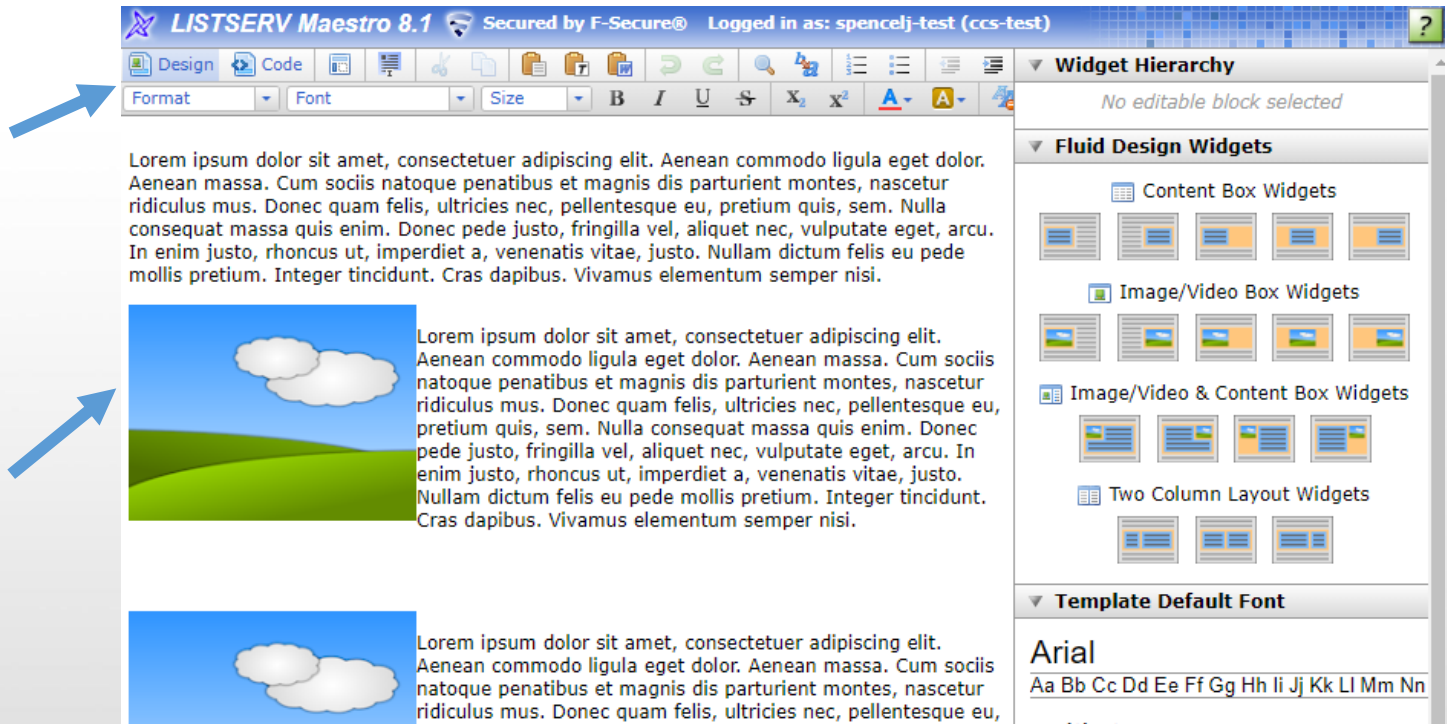


# Defining the Email Message

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

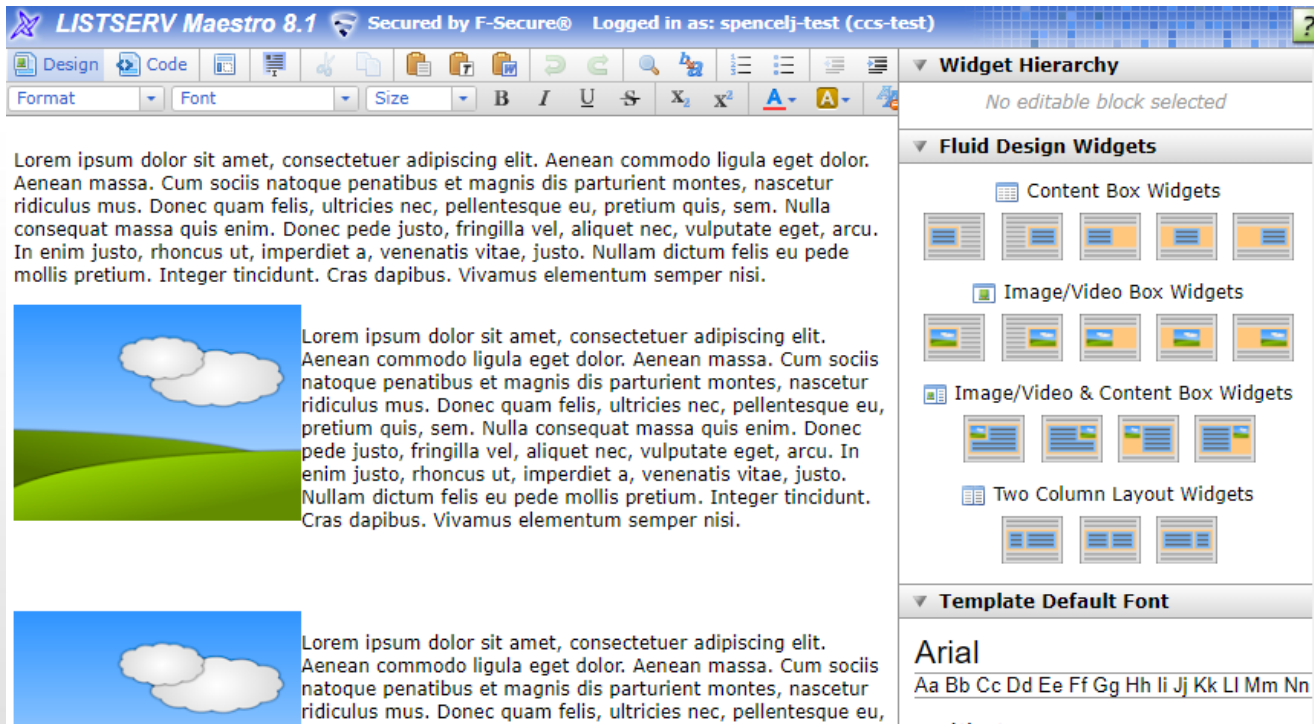
Editing tools allow you to change the format of your font, create links, and switch to HTML editing.

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 email editing area in Maestro is defined into several areas:



**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.



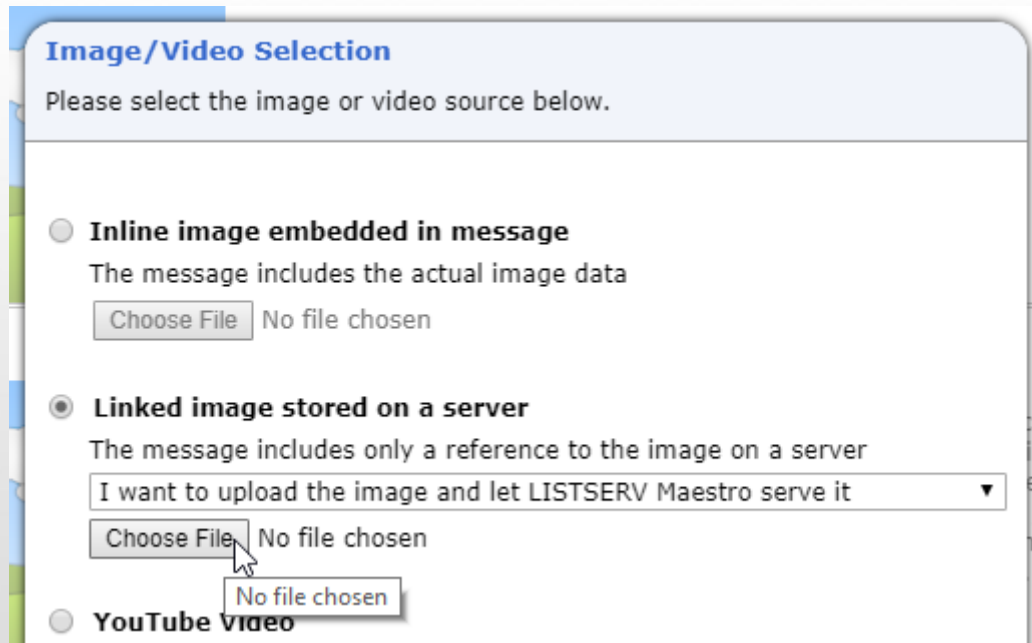
# Defining the Email Message

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. We recommend using the option to use a **Linked image stored on a server**, and select **I want to upload the image and let LISTSERV Maestro serve it**. You can also link to a YouTube Video in your email.



The screenshot shows a dialog box titled "Image/Video Selection" with the instruction "Please select the image or video source below." It contains three radio button options:

- Inline image embedded in message**  
The message includes the actual image data  
Choose File No file chosen
- Linked image stored on a server**  
The message includes only a reference to the image on a server  
I want to upload the image and let LISTSERV Maestro serve it  
Choose File No file chosen
- YouTube video**  
No file chosen

# 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.

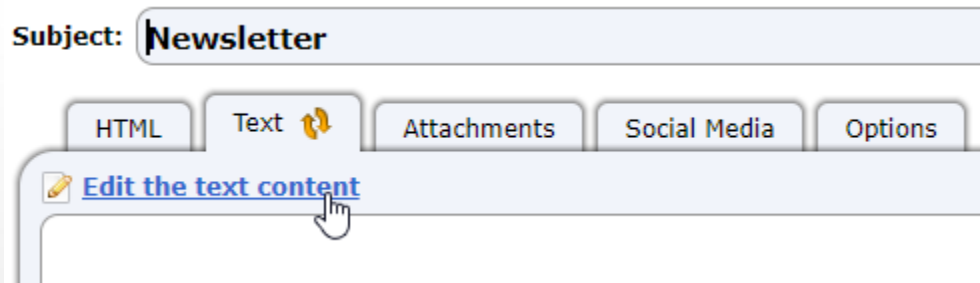
# Defining the Email Message

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 and selecting **Edit the text content**:



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

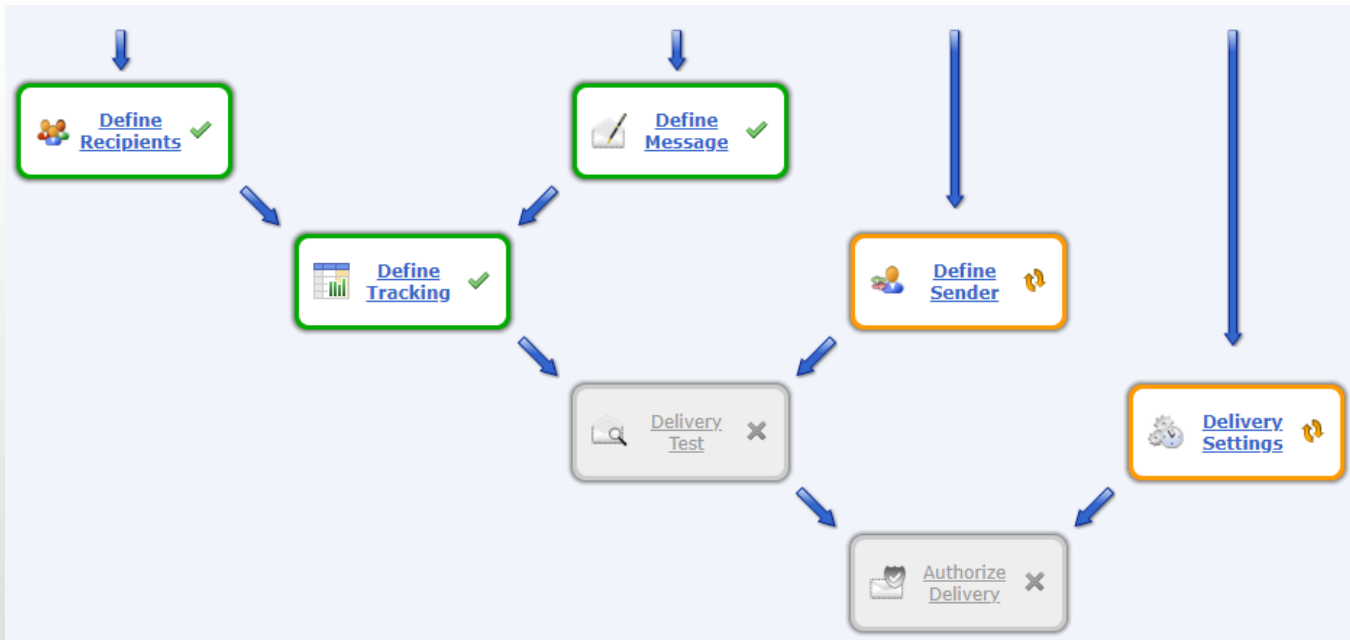
When you are finished adding the Text version of your email you can click OK in the bottom, right-hand corner of the page. There are three additional tabs you can use to further customize your message:

- **Attachments** – 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.
- **Social Media** – If your list is not a ListServ list, you can enable the Forward to a Friend settings here. These are disabled by default.
- **Options** – Under this tab, you can change the advanced options relating to your email. We do not recommend changing the settings here, as they may cause certain features of the text or HTML to fail in your email.

Once you are satisfied that your email content is complete, you can click **OK** in the bottom, right-hand corner of the page, and you will be taken back to the job steps area.

# 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:

The screenshot shows a web interface for selecting a job tracking type. At the top, there is a navigation bar with five tabs: [Tracking Selection](#) (which is highlighted), [Click Tracking](#), [Type](#), [Type Details](#), and [Summary](#). Below the navigation bar, there are three buttons: a "Cancel" button on the left, and "<- Back" and "Next ->" buttons on the right. The main content area is titled "Tracking Selection" and 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 users responses. Their descriptions explain the function of each tracking type:

[Tracking Selection](#) [Click Tracking](#) [Type](#) [Type Details](#) [Summary](#)

Cancel <- Back Next ->

**Tracking Type**

Choose the tracking type for this mail job.

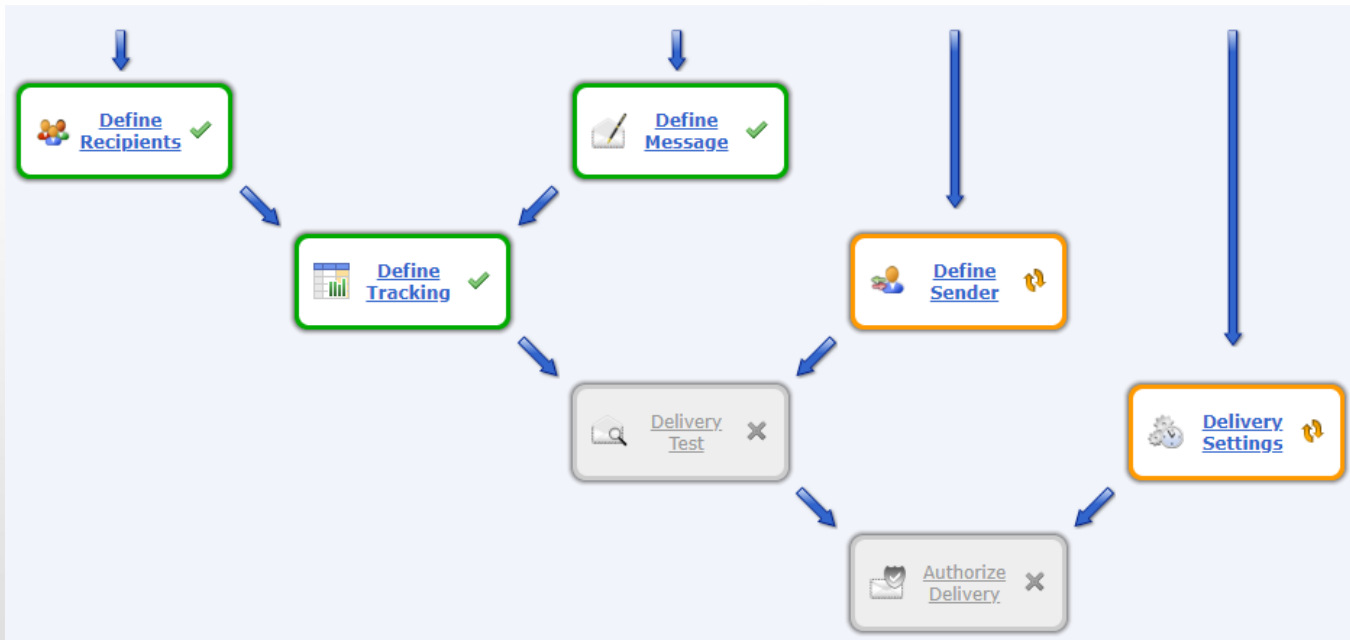
- Personal Tracking**  
Records events traceable to the individual who triggered them. Very specific information can be gathered about an individual's interaction with a message such as how many times a link has been clicked. This data can be related to personal information on the individuals being tracked.
- Anonymous Tracking**  
The collected tracking data is only associated with anonymous profiles that include no identifiable 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 any and 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 Test

Maestro requires a successful delivery test in order to send out the email. To set this up, select **Delivery Test** 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 Messages** when you are done.

Note: As of January 2019, checking the message for spam is currently unavailable as we debug issues with the spam checking system.

### 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
<a href="#">Clear Row</a>	<input type="text" value="ccs@uoguelph.ca"/>
<a href="#">Clear Row</a>	<input type="text"/>
<a href="#">Clear Row</a>	<input type="text"/>

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

[Advanced Options](#)

# 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.

The test messages have been delivered to the recipients supplied.

Number of delivered test recipients: 1

Number of suppressed test recipients: 0

Each recipient will receive **two copies** of the test message:

- The normal (original) HTML message.
- A plain text mail containing only the alternative text.

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

**Test Result Assessment**

**NO** - The delivery test results are not acceptable!

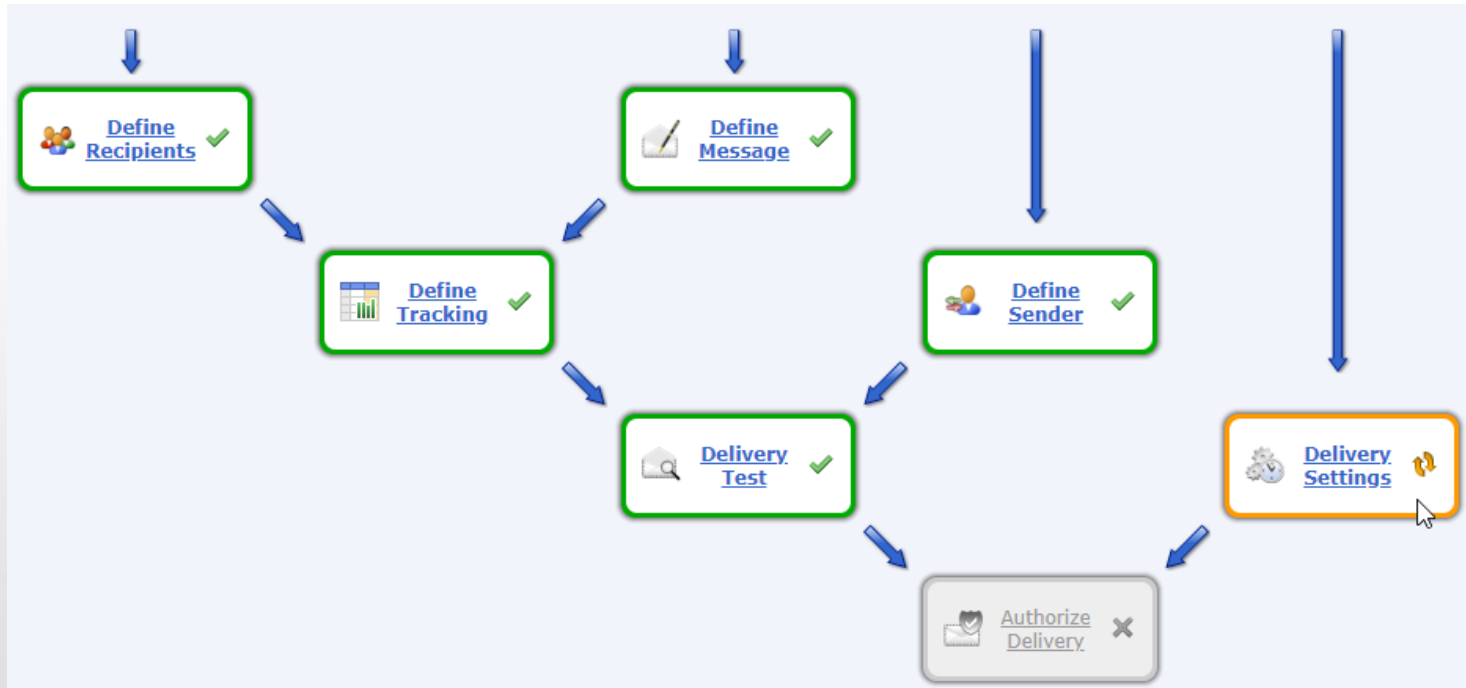
**YES** - The delivery test results are acceptable.

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

OK

# Delivery Settings

After the Delivery Test has been completed, the only remaining step before the email is sent is to complete the delivery settings. Click on **Delivery Settings** from the job steps area:



# Delivery Settings

Delivery Settings include three options, which are fairly 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.

# 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](mailto:ITHelp@uoguelph.ca) and your email will be directed to the appropriate team.