

DYNAMICS 365 – MAILUP CONNECTOR

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INTRODUCTION



INTRODUCTION

DYNAMICS 365 – MAILUP CONNECTOR

In this manual we represent and detail all features related to the installation of the new component «**Dynamics 365 – MailUp Connector**» within Microsoft Dynamics 365

The new solution allows to use MailUp's simple and scalable features to create, automate, and personalize Email & SMS within Dynamics 365.



NAVIGATION PATH



MAILUP CONNECTOR

The user, once logged in in to the system (through its credentials), uses the following navigation path in order to view **MailUp** functionalities.

The image shows two screenshots of the MailUp web interface. The top screenshot shows the main navigation bar with a yellow header containing the 'mailup' logo and 'DE RELEVANT' tagline. Below the header, there are navigation tabs for 'Sales', 'Service', 'Marketing', 'MailUp Connector', 'Settings', and 'Training'. A red dashed box highlights the 'MailUp Connector' tab, with a callout bubble containing the text: 'In the workspace, the user clicks on "MailUp Connector" box'. A hand cursor is shown clicking on the 'MailUp Connector' tab. The bottom screenshot shows the 'MailUp Connector' workspace. The top navigation bar is the same. Below it, there are five main sections: 'Communications', 'Templates', 'Placeholders', 'Settings', and 'External Link'. Each section contains several sub-items with icons. A red dashed box highlights the entire workspace area, with a callout bubble containing the text: 'These are the components displayed in this section'. A hand cursor is shown clicking on the 'MailUp Console' link under the 'External Link' section.

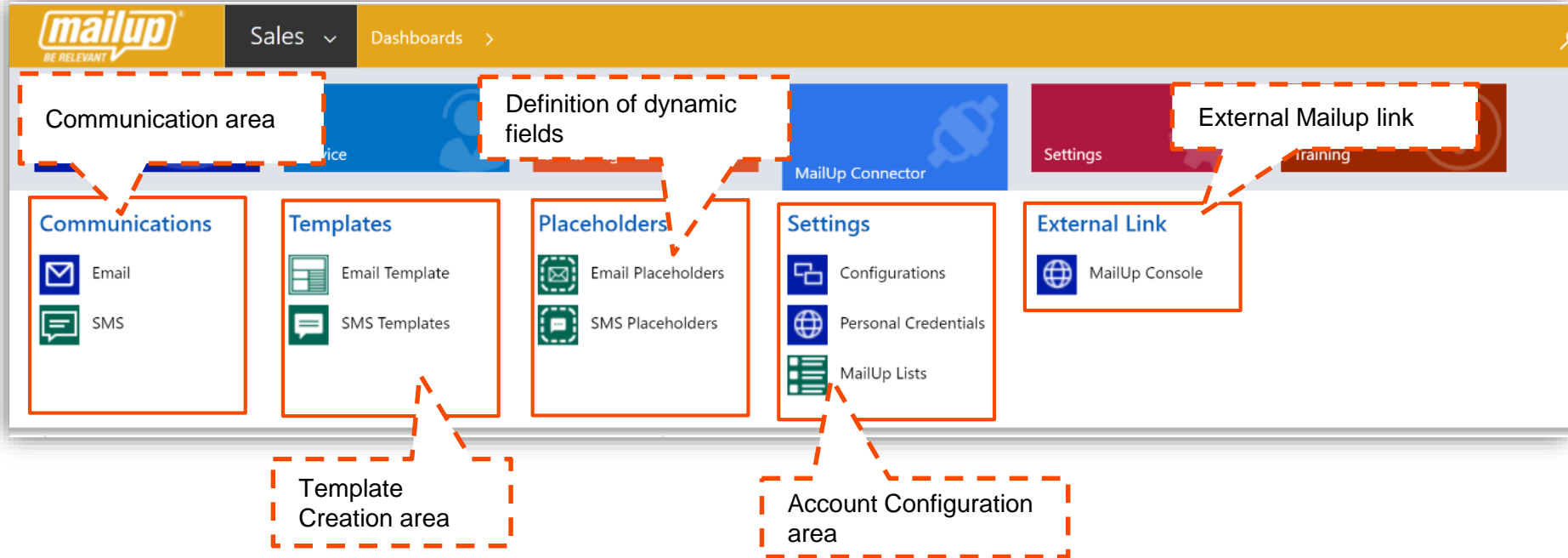
In the workspace, the user clicks on "MailUp Connector" box

These are the components displayed in this section

Communications	Templates	Placeholders	Settings	External Link
Email	Email Template	Email Placeholders	Configurations	MailUp Console
SMS	SMS Templates	SMS Placeholders	Personal Credentials	
			MailUp Lists	



MAILUP CONNECTOR SECTIONS



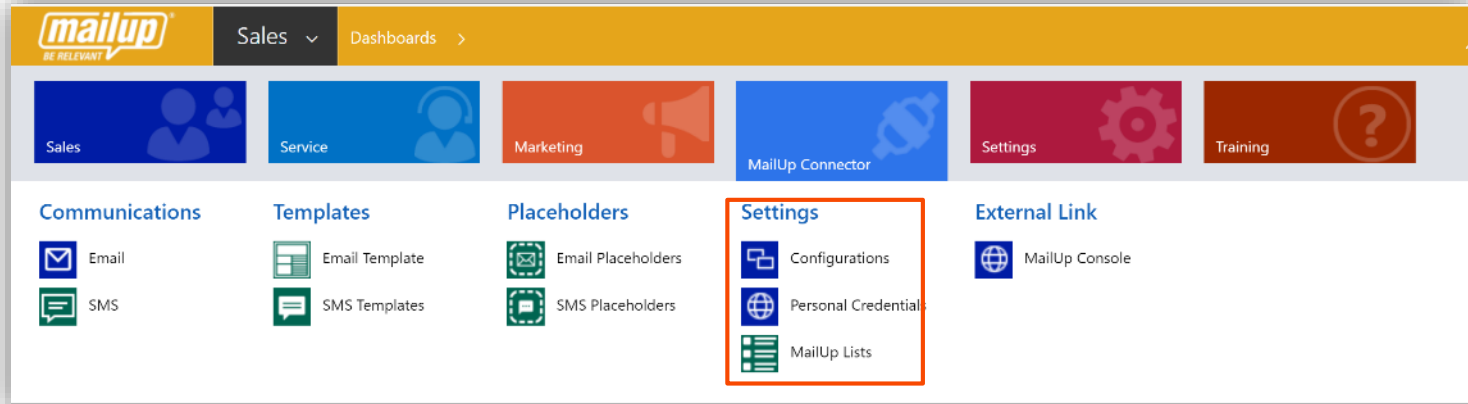
ACCOUNT/LIST CONFIGURATION



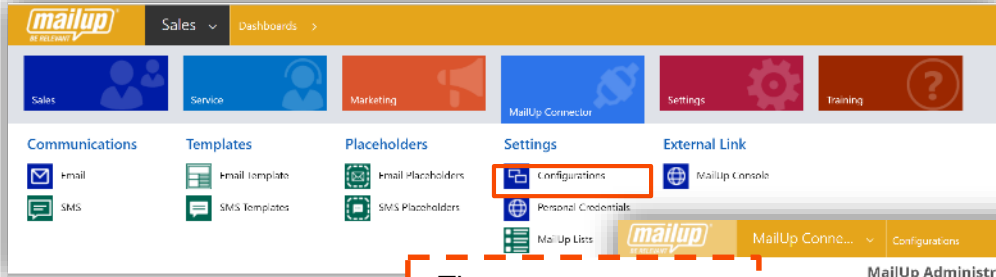
SETTINGS

Within the configuration section user can:

- Configuring Administrator Account
- Entering personal credentials for individual accesses
- Managing List



ACCOUNT ADMINISTRATOR



The user can request and associate a Mail up test version

Only administrators can view and make changes to the "Configurations" section

By clicking the button, user can embed the MailUp email editor

If user has already the credentials, he has to insert the login credentials related to the MailUp Administrator account

MailUp Administrator Credentials

MailUp UserName
m101828

MailUp Password
.....

Open MailUp Trial

Editor Email (Bee Plugin)

Automatically set up 'Trial' codes in order to use email editor

Automatic creation of default placeholders

After having configured the account, user can "Save"

Open Editor Registration Set Editor Trial Values Create Default Placeholders Save All



PERSONAL CREDENTIALS

The image shows a screenshot of the MailUp web interface. The top navigation bar includes 'Sales', 'Dashboards', and several menu items: 'Sales', 'Service', 'Marketing', 'MailUp Connector', 'Settings', and 'Training'. Below this, there are sections for 'Communications', 'Templates', 'Placeholders', 'Settings', and 'External Link'. The 'Settings' section is expanded to show 'Personal Credentials', which is highlighted by a hand cursor. A red dashed box points from this menu item to a text box on the left that says: "If user has already its credentials he can insert them in order to access MailUp".

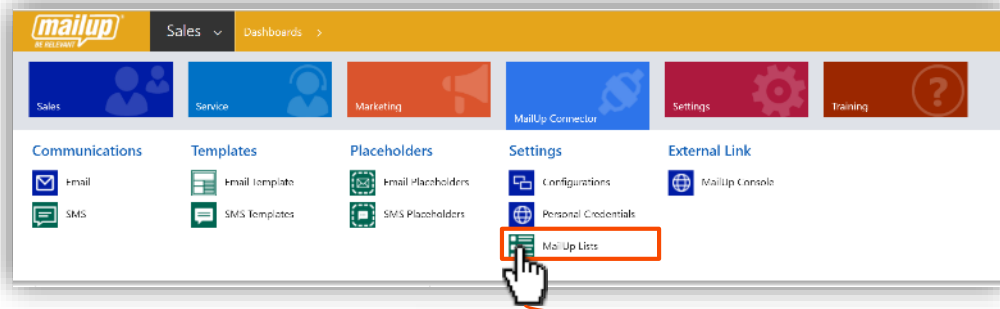
The main content area is titled 'Personal Credentials' and contains the following form fields:

- CRM Username:** REPLYNETf.vulcano
- CRM Email (Sender):** f.vulcano@reply.it
- MailUp Personal UserName:** FilippoVulcano
- MailUp Personal Password:**

A red dashed box points from the 'CRM Email (Sender)' field to a text box on the right that says: "Email address associated to the account".

At the bottom right of the form is a 'Save' button. A red dashed box points from this button to a text box on the right that says: "After having saved the information, system will send a verification email to the specified address".

VIEW MAILUP LISTS



The synchronization list is automatic only for "Pro" version

The screenshot shows the 'MailUp Lists' management interface. At the top, there's a navigation bar with 'MailUp Connector' and a dropdown menu. Below it, there are buttons for '+ NEW', 'SYNC FROM MAILUP', and 'DELETE'. The 'SYNC FROM MAILUP' button is highlighted with a red dashed box. A text box points to this button with the text: "User clicks on the button in order to synchronize MailUp lists in Dynamics 365". Below the buttons, there's a section for 'Active MailUp Lists' with a search bar. A table lists the active lists:

✓ Name	List Id	Created On ↓
News	1	7/18/2017 6:24 PM
Lista per prove	2	7/18/2017 6:24 PM

A red dashed box encloses the table, with a text box pointing to it that says "All associated lists".

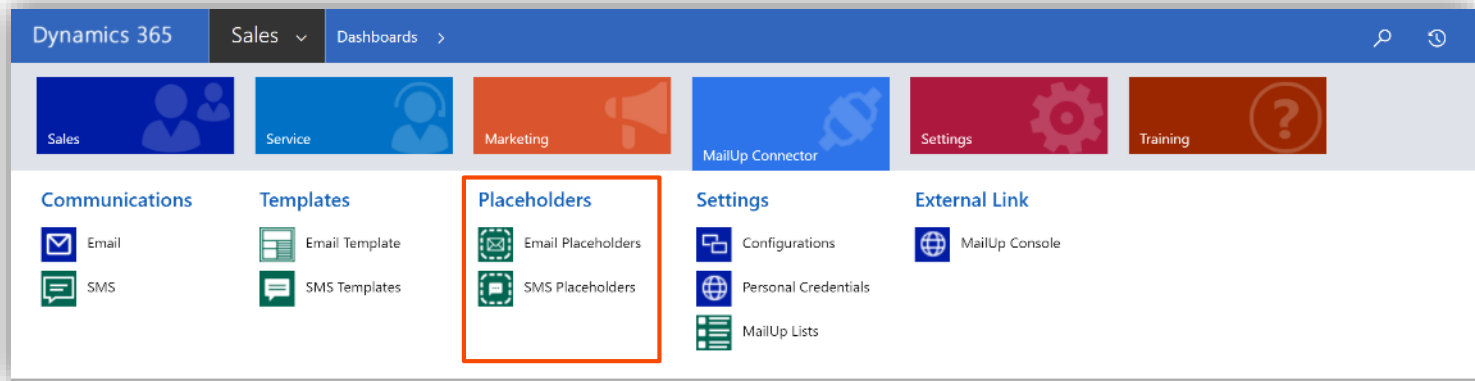


PLACEHOLDERS



PLACEHOLDERS

In Placeholders section, user can visualize and add new dynamic fields in order to use them for templates. Dynamic fields are related to Accounts, Lead and Contact entities of Microsoft Dynamics 365



EMAIL PLACEHOLDER

The screenshot displays the Dynamics 365 interface for the 'Email Placeholders' view. The top navigation bar includes 'Sales', 'Service', and 'Marketing'. The left sidebar shows 'Communications' with 'Email' and 'SMS' options, and 'Templates' with 'Email Templates' and 'SMS Templates'. The main content area shows a table of 'Active Email placeholders' with columns for Name, Tag, Record ID, and Created On. A search box is located at the top right of the table. A filter menu is open over the 'Name' column, showing options like 'Filter by Name', 'Filter by Tag', and 'Filter by Record ID'. Annotations with red dashed boxes and arrows point to these elements, explaining their functionality.

User clicks on Email Placeholders

System allows to select the reference view

Search box

In the view are present both manually and default records created by the system

By clicking on 'Filter', user can activate for each field the possibility to set specific filter criteria.

Name	Tag	Record ID	Created On
E-Mail	{@emailaddress}	Center	10/20/2017 2:41 PM
Url	{@url}	Center	10/20/2017 2:41 PM
UrlPhone	{@urlphone}	Center	10/20/2017 2:41 PM
UrlName	{@urlname}	Center	10/20/2017 2:41 PM
MobilePhone	{@mobilephone}	Center	10/20/2017 2:41 PM
MobilePhone	{@mobilephone}	Center	10/20/2017 2:41 PM
Telephone	{@telephone}	Account	10/20/2017 2:41 PM
Name	{@name}	Account	10/20/2017 2:41 PM
Address City	{@address-city}	Account	10/20/2017 2:41 PM
Address Name	{@address-name}	Account	10/20/2017 2:41 PM
Business	{@business}	Account	10/20/2017 2:41 PM
E-Mail	{@emailaddress}	Account	10/20/2017 2:41 PM
Telephone	{@telephone}	Account	10/20/2017 2:41 PM
Address Name	{@address-name}	Lead	10/20/2017 2:41 PM
Telephone	{@telephone}	Lead	10/20/2017 2:41 PM
Address City	{@address-city}	Lead	10/20/2017 2:41 PM
E-Mail	{@emailaddress}	Lead	10/20/2017 2:41 PM



SMS PLACEHOLDER

User clicks Email Placeholders

Search box

System allows you to select the reference view

In view are visualized both the manually and default records created by the system

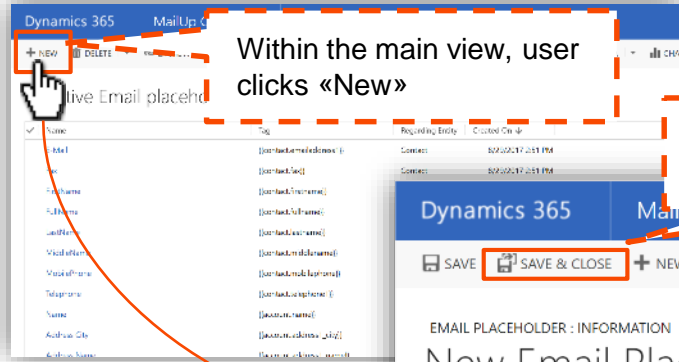
By clicking on 'Filter', user can activate for each field the possibility to set specific filter criteria.

The screenshot displays the Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Dashboards'. The left sidebar shows 'Communications' with 'Email' and 'SMS' options, and 'Templates' with 'Email Templates' and 'SMS Templates'. The 'Placeholders' section is active, showing 'Email Placeholders' and 'SMS Placeholders'. A hand icon points to the 'SMS Placeholders' option. The main content area shows the 'Active Sms Placeholders' view with a table of records. A dropdown menu is open over the table, showing filter options: 'Reset Filter', 'Sort Oldest to Newest', 'Sort Newest to Oldest', 'Contains Date', 'Contains No Date', 'Filter by Day', 'Filter by Week', 'Filter by Month', 'Filter by Year', 'Filter by Fiscal Period', 'Filter by Fiscal Year', and 'Custom Filter...'. A hand icon points to the 'Filter' button in the dropdown menu. A search box is visible at the top right of the table area.

Name	Tag	Registering E...	Created On
MiddleName	[[{account.middlename}]]	Contact	8/25/2017 2:5
MobilePhone	[[{contact.mobilephone}]]	Contact	8/25/2017 2:5
Telephone	[[{contact.telephone}]]	Contact	8/25/2017 2:5
Name	[[{account.name}]]	Account	8/25/2017 2:5
Address City	[[{account.address_city}]]	Account	8/25/2017 2:5
Address Name	[[{account.address_name}]]	Account	8/25/2017 2:5
Website	[[{account.website}]]	Account	8/25/2017 2:5
E-Mail	[[{account.emailaddress}]]	Account	8/25/2017 2:5
Telephone	[[{account.telephone}]]	Account	8/25/2017 2:5
Address Name	[[{account.address_name}]]	Lead	8/25/2017 2:5
Telephone	[[{lead.telephone}]]	Lead	8/25/2017 2:5
Address City	[[{lead.address_city}]]	Lead	8/25/2017 2:51 PM
Full Name	[[{lead.fullname}]]	Lead	8/25/2017 2:51 PM
First Name	[[{lead.firstname}]]	Lead	8/25/2017 2:51 PM
Last Name	[[{lead.lastname}]]	Lead	8/25/2017 2:51 PM
Middle Name	[[{lead.middlename}]]	Lead	8/25/2017 2:51 PM
Full Name	[[{lead.fullname}]]	Lead	8/25/2017 2:51 PM
Address City	[[{contact.address_city}]]	Contact	8/25/2017 2:51 PM



CREATING A NEW PLACEHOLDER



Within the main view, user clicks «New»

The creation activity works for both contact modes (Email, SMS)

Dynamics 365 MailUp C...
Email Placeholders -> New Email Placeholder...

SAVE | SAVE & CLOSE | + NEW | FORM EDITOR

EMAIL PLACEHOLDER : INFORMATION
New Email Placeholder

Record name

Through the tag, user specifies the field from which retrieve the information

Regarding entity from which taking the information. User can select:
• Lead
• Account
• Contact

This characters sequence must be in the following format: {{RegardingEntity.Namefield}}

Tag * {{lead.address1_city}}

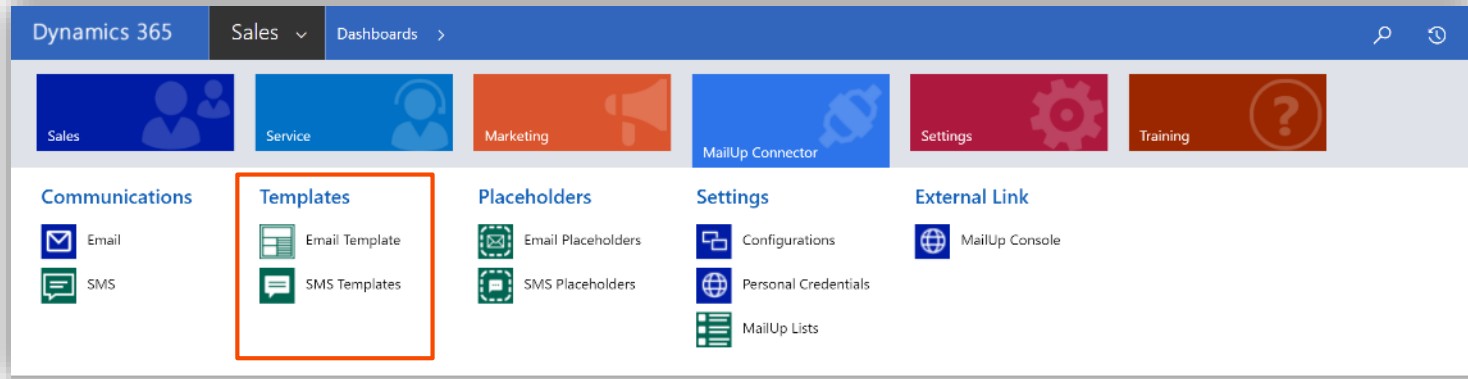


TEMPLATE GENERATION



TEMPLATES

Within the Templates area, user can view all templates or create other ones in order to use them in Email or SMS communications.



TEMPLATE VIEW

The system allows you to select the reference view

Search box

Search / filter features are available also in the SMS view

By clicking on 'Filter', user can activate for each field the possibility to set specific filter criteria.

Dynamics 365 | Sales | Dashboards

Communications | **Templates** | Placeholders | Settings | External Link

Active Email Templates

Name	Subject	Regarding To	Created On
Prova per Filippo	Ciao Filippo, vieni a trovarci.	Contact	
Nuovo Template	Ciao {contact.fullname}, questa è una prova.	Contact	
Campaagna Commerciale 2018 Test	Ciao {contact.fullname}! Vieni a trovarci in negozio!	Contact	
Campaagna Commerciale 2017	Non perderti queste fantastiche promozioni!	Contact	
Prova di gestione statistiche multiple	Prova di gestione statistiche multiple	Contact	
New products - Test	Try our new products!	Contact	
Test Andrea 8	Test Andrea 8	Contact	
Test Andrea 7	Test Andrea 7	Contact	
Test Andrea?	Ciao!	Contact	
Test Andrea	Bravo! Vieni a visitare Parafeloni!	Contact	8/1/2017 4:48 PM
Test salvo	salvo	Contact	7/18/2017 3:39 PM
test castoro	test castoro	Contact	7/12/2017 3:42 PM
Template Account	Vero che invio questo mail con oggetto "pippo"	Account	7/4/2017 5:01 PM



CREATE EMAIL TEMPLATE

Within the main view, user clicks «New»

After having inserted all the required information, user clicks «Save»

Only after saving record user can use the features of the HTML editor

Template Name

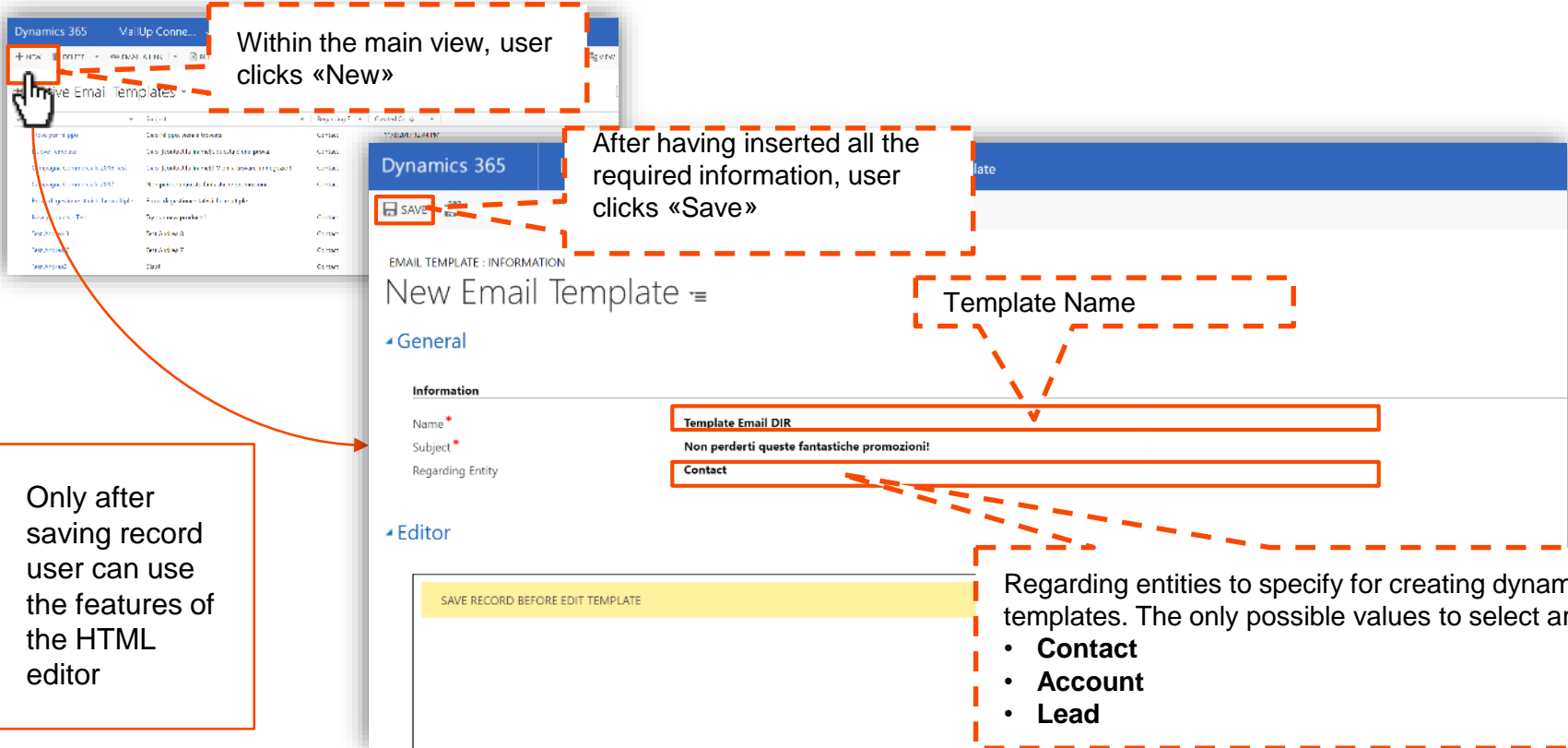
Template Email DIR

Non perderti queste fantastiche promozioni!

Contact

Regarding entities to specify for creating dynamic templates. The only possible values to select are:

- **Contact**
- **Account**
- **Lead**



OPEN EDITOR EMAIL

Area in which user can drag the elements presented in the control panel

Control panel area

CONTENT STRUCTURE BODY

Within the editor, user can use simple drag and drop operations to configure the template

The image illustrates the Dynamics 365 Mailbox Connector email editor interface. The main window shows the 'Template Email Editor' with a control panel on the left and an editor area on the right. The control panel is highlighted with a red dashed box and contains a 'General' section and an 'Editor' section. The editor area is also highlighted with a red dashed box and contains a 'No content here. Drag elements from the control panel.' message. Three inset windows show the 'CONTENT', 'STRUCTURE', and 'BODY' tabs, each with a red dashed box and an arrow pointing to the corresponding tab in the main editor. The 'CONTENT' tab shows a grid of elements like TEXT, IMAGE, and BUTTON. The 'STRUCTURE' tab shows a grid of content blocks. The 'BODY' tab shows a 'GENERAL OPTIONS' section with settings like Content area width, Background color, Content area background color, Default font, and Full cover.



DRAG AND DROP EMAIL

The image shows a multi-step process of creating an email. On the left, a control panel contains various elements like images, text, and social media icons. A dashed orange box highlights this panel. In the center, the main editor area shows a preview of the email with a 'Merge tags' button highlighted by a dashed orange box. On the right, a dialog box titled 'Insert merge tags' is open, showing a list of dynamic fields like 'Address City', 'Email', and 'Full Name'. A dashed orange box highlights this dialog box. A hand cursor is shown clicking on the 'Merge tags' button in the editor.

By inserting a text area, user can specify a dynamic field in the body message by clicking on "Merge tags"

User, by dragging the different elements from the control panel, can set:

- the content
- structure

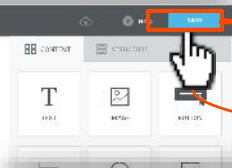
Insert merge tags

Address City
Address Name
Birth Date
Company
E-Mail
Fax
FirstName
FullName
LastName
MobileHome
MobilePhone

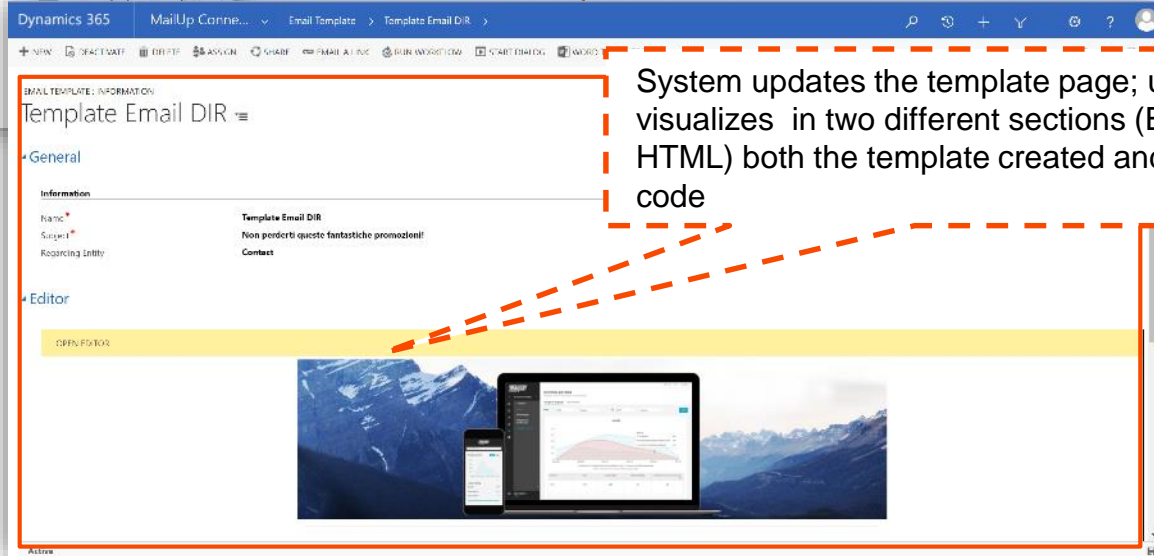
In order to specify a dynamic field, it must be present in the Placeholder section and the related entity must be selected during the creation



VIEW TEMPLATE EMAIL



After having configured the template, user clicks on «Save»



System updates the template page; user visualizes in two different sections (Editor, HTML) both the template created and its html code

Once created and saved, contents and images loaded in the email editor are visible for each Business Unit



CREATE SMS TEMPLATE

User clicks «new» to create a new template

After having inserted all the required information, user clicks «Save»

Name

Template SMS DIR

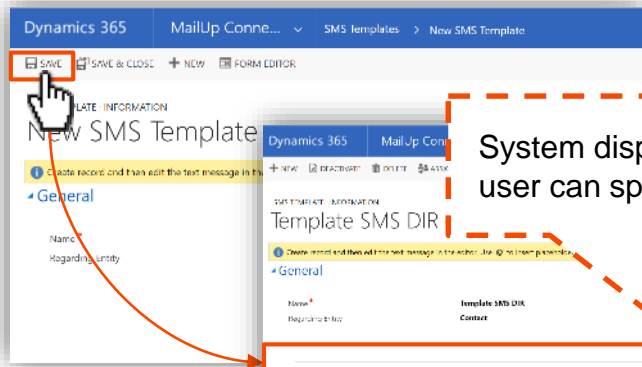
Regarding entities to specify for creating dynamic templates. The only possible values to select are:

- Contact
- Account
- Lead

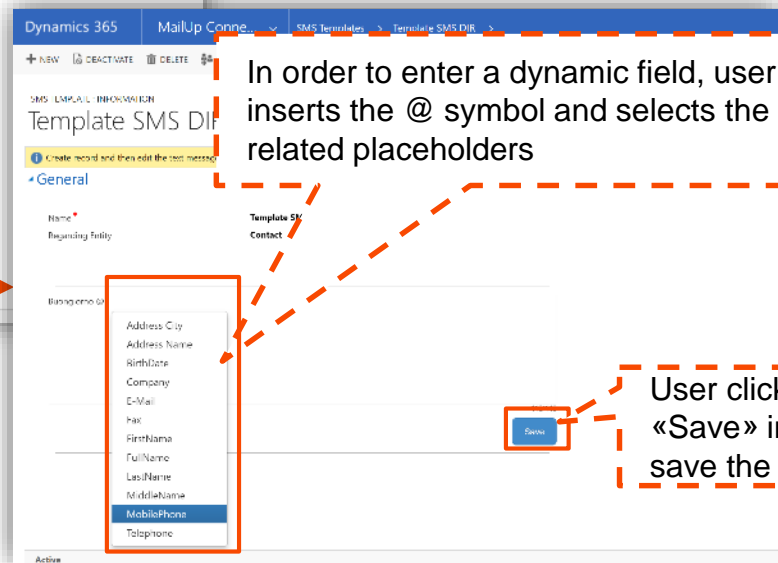
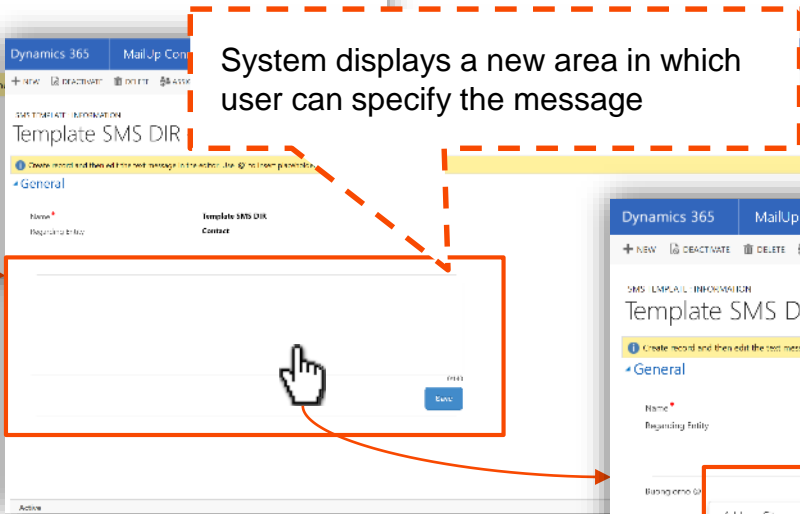
If «Regarding Entity» field is populated, the record is automatically saved



MESSAGE AND DYNAMIC FIELDS



System displays a new area in which user can specify the message



In order to enter a dynamic field, user inserts the @ symbol and selects the related placeholders

User can enter only the placeholder configured according to the specified entity

User clicks on «Save» in order save the message



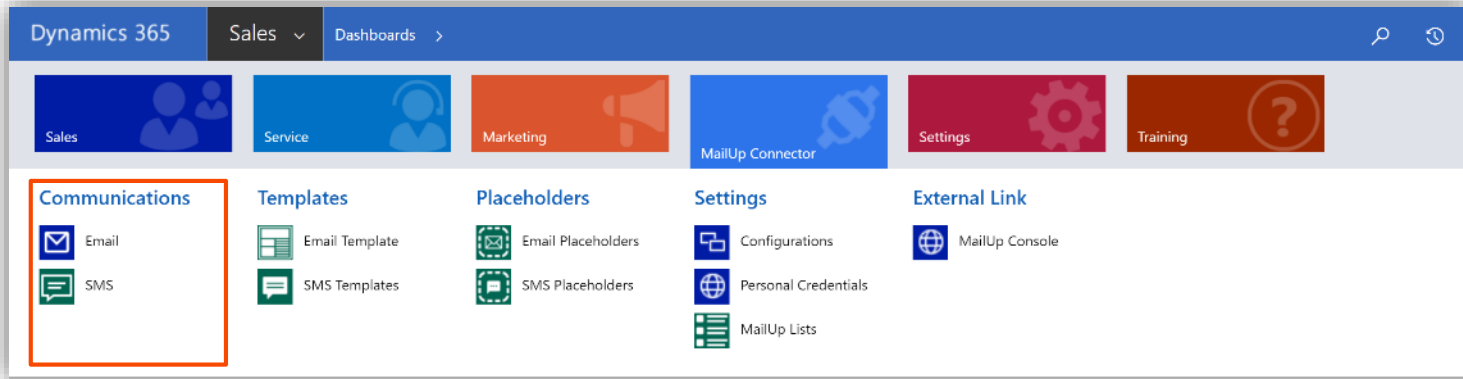
SINGLE SENDS



SINGLE SENDS

In communication section user can:

- Visualize all the email/sms managed
- Create new single email/sms



EMAIL VIEW

The screenshot shows the Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Dashboards'. Below this are several tiles for 'Sales', 'Service', 'Marketing', 'MailUp Connector', 'Settings', and 'Training'. The left sidebar has 'Communications' and 'Templates' sections. The 'Email' view is active, showing a list of communication records. A hand cursor points to the 'Email' icon in the sidebar. Two callout boxes with dashed orange borders provide annotations: one points to the 'From' column header and another points to the 'To' column header. A table of communication records is displayed below the headers.

User visualizes the sender of the communication

User visualizes the recipient of the communication

Subject	From	To	Regarding	Priority	Status Reason	Modified On
Con Web api ci piace tanto, capito Stefania Stubberod (sample)?	Cluster - Test.CRM	Stefania Stubberod (sample)	DEM	Normal	Ready	11/15/2017 3:37 PM
Con Web api ci piace tanto, capito Sidney Higa (sample)?	Cluster - Test.CRM	Sidney Higa (sample)	DEM	Normal	Ready	11/15/2017 3:37 PM
Con Web api ci piace tanto, capito Eraldo Sammuri?	Cluster - Test.CRM	Eraldo Sammuri	DEM	Normal	Ready	11/15/2017 3:37 PM
Con Web api ci piace tanto, capito Andrea Aquila?	Cluster - Test.CRM	Andrea Aquila	DEM	Normal	Ready	11/15/2017 3:37 PM
Con Web api ci piace tanto, capito Alessandro Vita?	Cluster - Test.CRM	Alessandro Vita	DEM	Normal	Ready	11/15/2017 3:37 PM
Con Web api ci piace tanto, capito Alessandro Vita?	Alessandro Vita	Alessandro Vita	Alessandro ...	Normal	Sent	11/15/2017 3:32 PM
Ciao Alessandro Vita! Vieni a trovarci in negozioli!	Alessandro Vita	Alessandro Vita	Alessandro ...	Normal	Sent	11/11/2017 10:10 PM
Ciao Filippo, vieni a trovarci.	Cluster - Test.CRM	Eraldo Sammuri	DEM Email	Normal	Failed	11/8/2017 1:07 PM
Ciao Filippo, vieni a trovarci.	Cluster - Test.CRM	Andrea Aquila	DEM Email	Normal	Ready	11/8/2017 1:06 PM
Ciao Filippo, vieni a trovarci.	Cluster - Test.CRM	Alessandro Vita	DEM Email	Normal	Ready	11/8/2017 1:06 PM
Ciao Filippo, vieni a trovarci.	Cluster - Test.CRM	Stefania Stubberod (sample)	DEM Email	Normal	Ready	11/8/2017 1:06 PM



CREATE NEW EMAIL

User clicks on Email

User selects the template to use

Contact, Account, Lead

If it has been already inserted a template it is not necessary inserting none information in the object and body message

The image illustrates the process of creating a new email in Dynamics 365. It shows the navigation pane on the left with the 'Email' icon highlighted. The main area displays a list of emails under 'All Emails'. A callout box indicates that the user clicks on the 'EMAIL' tab. Another callout box shows the user selecting a template from the 'New Email' form. The form fields are highlighted with red boxes: 'Template Email DIR', 'Filippo Vulcano', 'Filippo Vulcano: n.prova@email.it', and 'Filippo Vulcano'. A callout box points to the 'Regarding' field, indicating that the user selects a contact, account, or lead. A final callout box explains that if a template is already inserted, no additional information is needed in the object and body message.

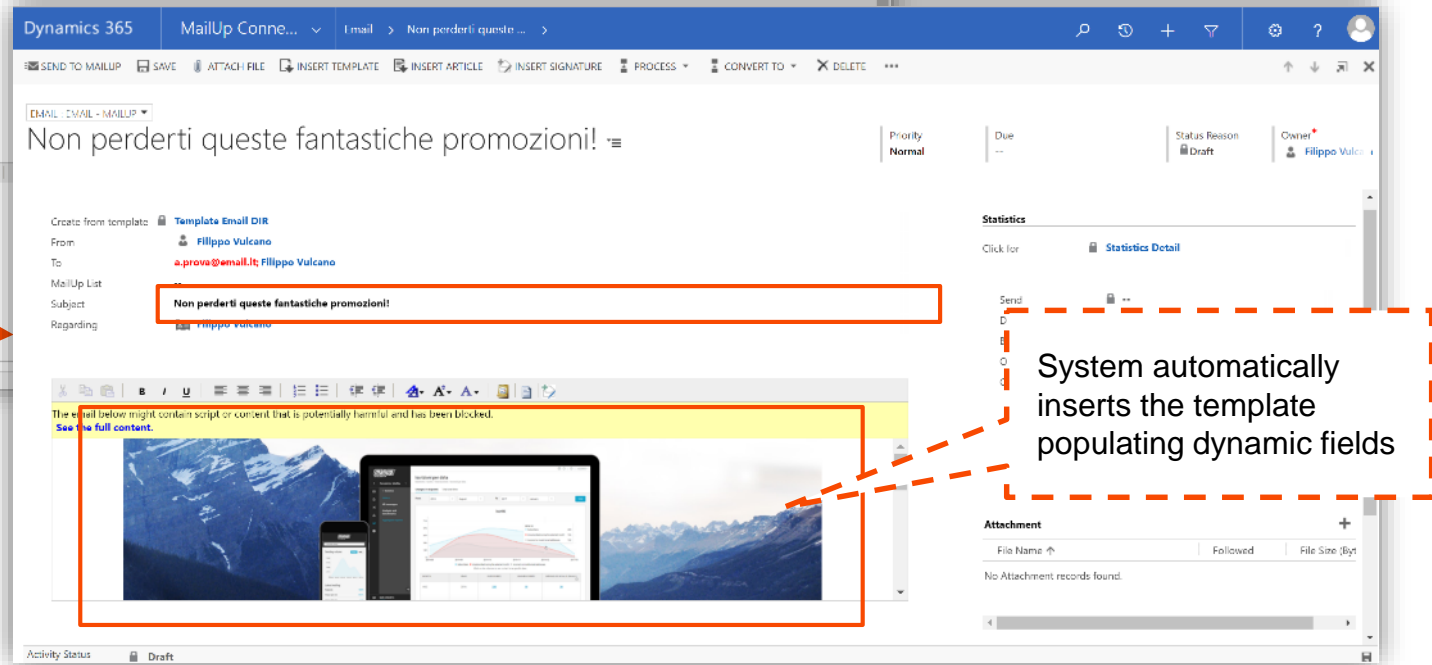


TEMPLATE ASSOCIATION



After having inserted all the required information, user clicks «Save»

This screenshot shows the Dynamics 365 'New Email' form. The 'SAVE' button is highlighted with a red dashed box and a hand cursor icon. A red arrow points from this button to the 'Non perderti queste fantastiche promozioni!' text in the second screenshot.



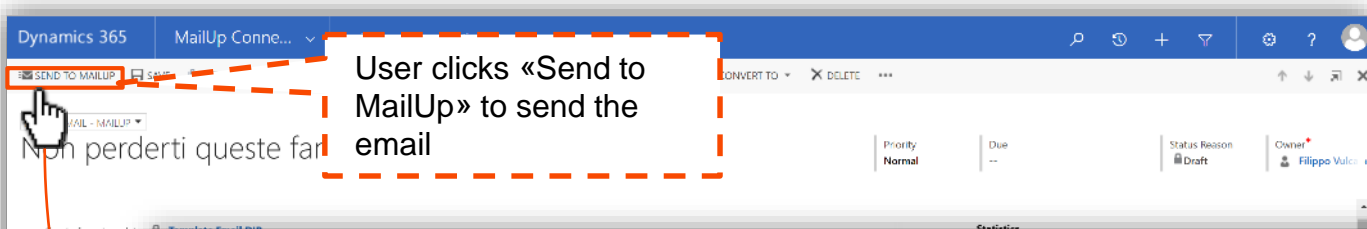
Non perderti queste fantastiche promozioni! =

System automatically inserts the template populating dynamic fields

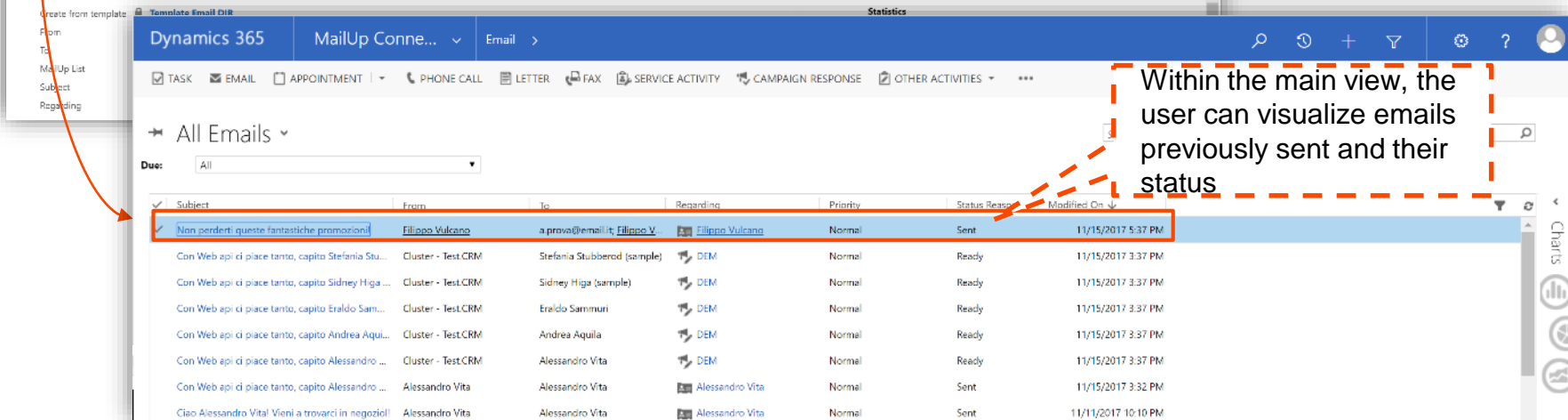
This screenshot shows the Dynamics 365 email draft. The subject line 'Non perderti queste fantastiche promozioni!' is highlighted with a red box. The email body contains a banner image with a laptop and a smartphone. A red dashed box highlights the subject line and the banner image, with a red arrow pointing from the 'SAVE' button in the first screenshot to this area. The 'Attachment' section at the bottom shows 'No Attachment records found.'



EMAIL SEND



Dynamics 365 MailUp Conne...
SEND TO MAILUP
Non perderti queste fan...
User clicks «Send to MailUp» to send the email



Dynamics 365 MailUp Conne... Email
TASK EMAIL APPOINTMENT PHONE CALL LETTER FAX SERVICE ACTIVITY CAMPAIGN RESPONSE OTHER ACTIVITIES
All Emails
Due: All
Subject From To Regarding Priority Status Reason Modified On
Non perderti queste fantastiche promozioni Filippo Vulcano a.prova@email.it; Filippo V... Filippo Vulcano Normal Sent 11/15/2017 3:37 PM
Con Web api ci piace tanto, capito Stefania Stu... Cluster - Test.CRM Stefania Stubberod (sample) DEM Normal Ready 11/15/2017 3:37 PM
Con Web api ci piace tanto, capito Sidney Higa ... Cluster - Test.CRM Sidney Higa (sample) DEM Normal Ready 11/15/2017 3:37 PM
Con Web api ci piace tanto, capito Eraldo Sam... Cluster - Test.CRM Eraldo Sammuri DEM Normal Ready 11/15/2017 3:37 PM
Con Web api ci piace tanto, capito Andrea Aquil... Cluster - Test.CRM Andrea Aquila DEM Normal Ready 11/15/2017 3:37 PM
Con Web api ci piace tanto, capito Alessandro ... Cluster - Test.CRM Alessandro Vita DEM Normal Ready 11/15/2017 3:37 PM
Con Web api ci piace tanto, capito Alessandro ... Alessandro Vita Alessandro Vita Alessandro Vita Normal Sent 11/15/2017 3:32 PM
Ciao Alessandro Vital! Vieni a trovarci in negoziat... Alessandro Vita Alessandro Vita Alessandro Vita Normal Sent 11/11/2017 10:10 PM

Within the main view, the user can visualize emails previously sent and their status



MAILUP EMAIL STATISTICS

The image shows a screenshot of the Dynamics 365 MailUp interface. The top navigation bar includes 'Dynamics 365', 'MailUp Conne...', and 'Email'. Below this, there are tabs for 'All Emails' and a search bar. A list of emails is visible, with one email selected and highlighted in orange. A hand cursor is pointing at this email. An orange arrow points from the selected email to the main email view.

The main email view shows the subject 'Non perderti queste fantastiche promozioni!' and the sender 'Filippo Vulcano'. The email content includes a yellow banner with the text 'This email was sent with MailUp' and a section titled 'The small below might contain script or content that is potentially harmful and has been blocked. See the full content.' Below this is a large image of a laptop and a smartphone displaying a dashboard with a line graph.

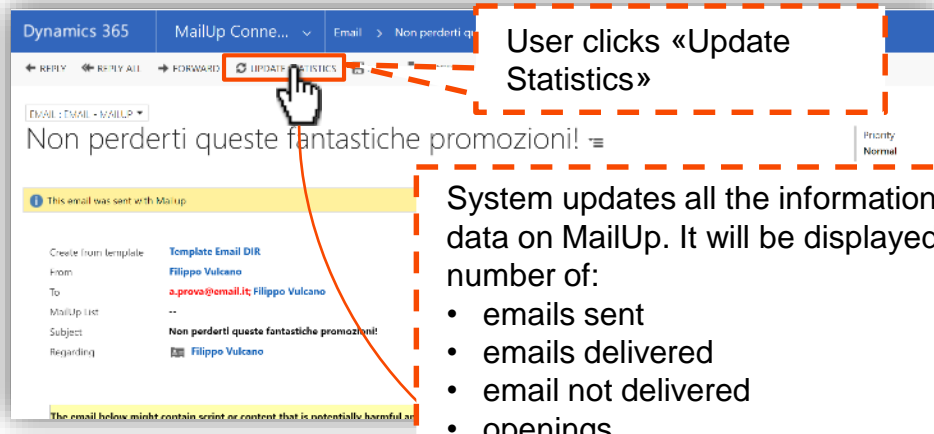
On the right side of the email view, there is a 'Statistics counter' section. It is titled 'Statistics' and includes a 'Click for' link. Below this is a table of statistics:

Statistic	Value
Send	1
Delivered	1
Bounced	0
Opens	0
Clicks	0
Last Update	11/15/2017 5:20 PM

The 'Statistics counter' section is highlighted with a red dashed box. Below the statistics table, there is an 'Attachment' section with the text 'No Attachment records found.'



STATISTICS MAILUP UPDATE

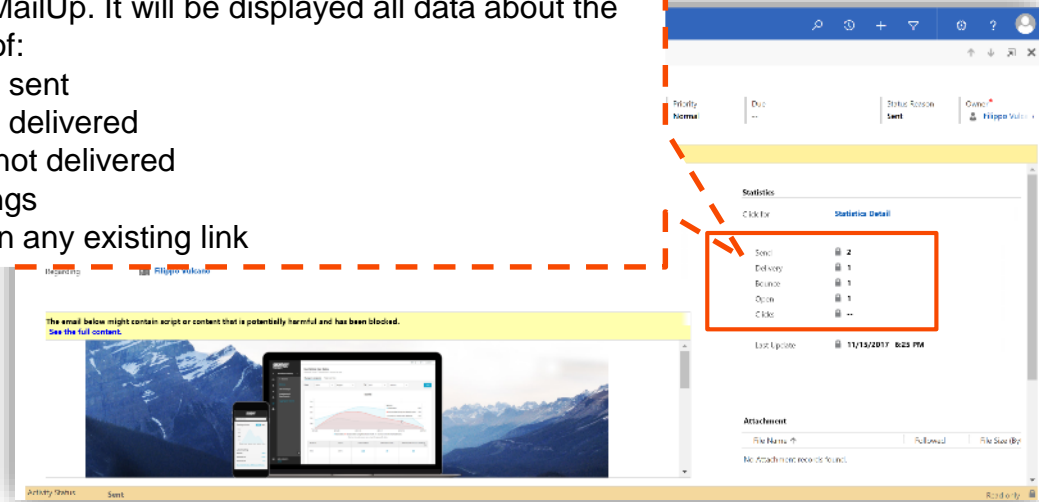


User clicks «Update Statistics»

System updates all the information according to the data on MailUp. It will be displayed all data about the number of:

- emails sent
- emails delivered
- email not delivered
- openings
- click on any existing link

In the PRO version, the update is automatically performed by the system



STATISTICS MAILUP

fantastiche promozioni! =

By clicking on the record the user can see the details of the statistics

Statistics

Statistics Detail

Last Update: 11/15/2017 4:25 PM

Dynamics 365 MailUp Connect

Statistics Detail =

Send: 2, Open: 1, Bounce: 1

Statistics Detail by Operation

Active Statistics Details

Count of Statistics Detail

Operation	Count
Bounce	1
Open	1
Send	2

Statistics Detail

ID	Operation	E-mail	IP Address	Name Type	Time	Created On
142	Send	AG	No address		11/15/2017 4:25 PM	11/15/2017 4:25 PM
	Open	FRANCESCO@BYE	178.207.114		11/15/2017 4:25 PM	11/15/2017 4:25 PM
	Bounce	MARCO@MILIT	No address	46	11/15/2017 4:25 PM	11/15/2017 4:25 PM

Related MailUp statistics are also present within the related contact



SMS VIEW

The image displays the Dynamics 365 Sales interface. The top navigation bar includes 'Sales', 'Service', 'Marketing', 'MailUp Connector', 'Settings', and 'Training'. Below this, the 'Communications' section is highlighted, with the 'SMS' option selected. A hand cursor is shown clicking on the SMS icon.

The main view is titled 'MailUp Connector' and shows a table of SMS records. A search bar at the top left of the table is set to 'All SMS'. The table columns include 'Status', 'To', 'Phone Number', 'Status Reason', 'Subject', and 'Text'. A 'Communication recipient' list is visible on the right side of the table.

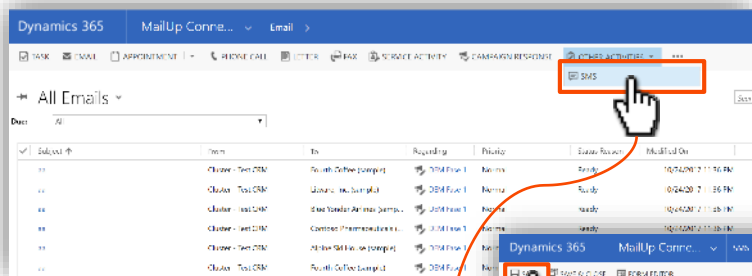
Annotations in orange dashed boxes highlight the following features:

- Search, filter, and display selection features described in slide 20 are available**: Points to the search bar at the top left of the table.
- It is possible to select specific views to display**: Points to the 'All SMS' dropdown menu.
- State of the record**: Points to the 'Status' column.
- Communication recipient**: Points to the list of recipients on the right.

Status	To	Phone Number	Status Reason	Subject	Text	Communication recipient
Sent	Alessandro Vito	000	17/2	Sent	Hi, Fabio	Alessandro Vito
Sent	Alessandro Vito	000	17/2	Sent	Hi, Fabio 2	Alessandro Vito
Ready				Ready	can web-agi	DBM SMS
Ready			30	Ready	can web-agi	DBM SMS
Ready			17/2	Ready	can web-agi	DBM SMS
Ready			17/2	Ready	can web-agi	DBM SMS
Ready			17/2	Ready	can web-agi	DBM SMS
Sent			17/2	Sent	can web-agi	Alessandro Vito
Ready	Utile per prova	Alessandro Vito	17/2	Ready	prova inda SMS ve Andrea	Alessandro Vito
Ready	Utile per prova	Fabio Sammar	17/2	Ready	prova inda SMS ve Andrea	Ultimo test
Ready	Utile per prova	Andrea Accia	000	Ready	prova inda SMS ve Andrea	Ultimo test
Ready	Utile per prova	Stefano S. Barbero (sample)	000	Ready	prova inda SMS ve Andrea	Ultimo test
Ready	Utile per prova	A. D'Amico Corporation (sample) - our	000	Ready	prova inda SMS ve Andrea	Ultimo test
Ready		Alessandro Vito	17/2	Ready	prova inda SMS ve Andrea	Prova invia SMS

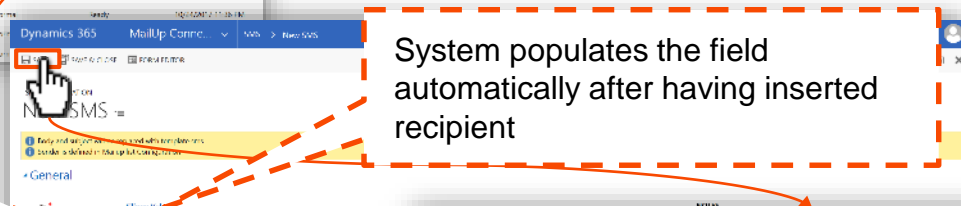


CREATE A NEW SMS



User can use a template already on the system

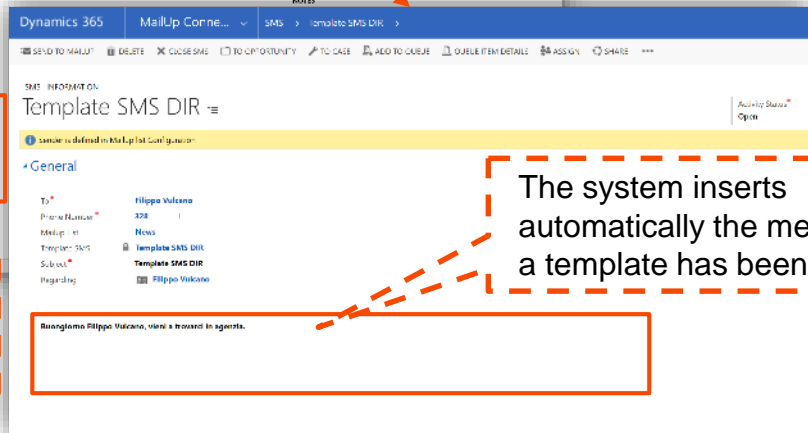
If a SMS template is used, user must specify its reference record in the "Regarding" field



System populates the field automatically after having inserted recipient



Area where you can enter the message



The system inserts automatically the message if a template has been inserted



INVIO SMS

User selects «Send to MailUp»

Dynamics 365

SEND TO MAILUP

Template SMS DIR

General

Filippo Vulcano

Project Manager

MailUp

Template SMS DIR

Subject

Template SMS DIR

Filippo Vulcano

Buongiorno Filippo Vulcano, vieni a trovarci in agenzia.

Within the main view, user can view the single SMS previously sent and their status

Dynamics 365

MailUp Conne...

SMS

TASK EMAIL APPOINTMENT PHONE CALL LETTER FAX SERVICE ACTIVITY CAMPAIGN RESPONSE OTHER ACTIVITIES

All SMS

Due: All

MailUp List	To	Phone Number	Status Reason	Subject	Text	Regarding	Date Created
News	Filippo Vulcano	328 98	Sent	Template SMS DIR	Buongiorno Filippo Vulcano, vieni a trovarci in agenzia.	Filippo Vulcano	11/16/2017 12:27 PM
News	Filippo Vulcano	328 98	Draft	appuntamento			11/16/2017 12:08 PM
	Alessandro Vita	003 998723	Sent	IE Invio	Ciao Alessandro Vita	Alessandro Vita	11/16/2017 10:59 AM
	Alessandro Vita	003 998723	Sent	IE invio 2	Ciao Alessandro Vita	Alessandro Vita	11/16/2017 10:58 AM
	Eraldo Sammuri		Ready	con web api	Ciao, Eraldo Sammuri, come va?	DEM SMS	11/15/2017 3:39 PM
	Andrea Aquila	003 4000	Ready	con web api	Ciao, Andrea Aquila, come va?	DEM SMS	11/15/2017 3:39 PM
	Alessandro Vita	003 998723	Ready	con web api	Ciao, Alessandro Vita, come va?	DEM SMS	11/15/2017 3:39 PM



CAMPAIGN CONFIGURATION



CAMPAIGN

Features related to the MailUp connector can also be used within a generic campaign. Through this new configuration, user can evaluate/analyze the contact results (detail statistics) in the generic campaign in order to evaluate the interest in the submitted proposals.

The screenshot shows the Dynamics 365 Marketing interface for a 'Mailup Connector' campaign. The breadcrumb trail is 'Marketing > Campaigns > Mailup Connector'. The page title is 'Mailup Connector'. The summary section shows the following details:

- CAMPAIGN**
 - Name: Mailup Connector
 - Campaign Code: CMP-01043-T3R6Q9
 - Currency: euro
 - Campaign Type: Advertisement
 - Expected Response(%): --
- SCHEDULES**
 - Proposed Start: --
 - Proposed End: --
 - Actual Start: --
 - Actual End: --

The 'MARKETING LISTS' section shows 'No Marketing List records found.' The 'Statistics' section shows a message: 'A chart cannot be displayed because the view or filter criteria that you selected did not return any records.'

Sending of Emails and SMS associated with campaigns is only provided with the PRO version of the connector

The subject of a campaign can contain a maximum of 20 characters



CAMPAIGN ACTIVITY

After you have created a campaign and associated its related target (Marketing Lists), you can specify, within a generic activity (campaign activity), the following contact channels :

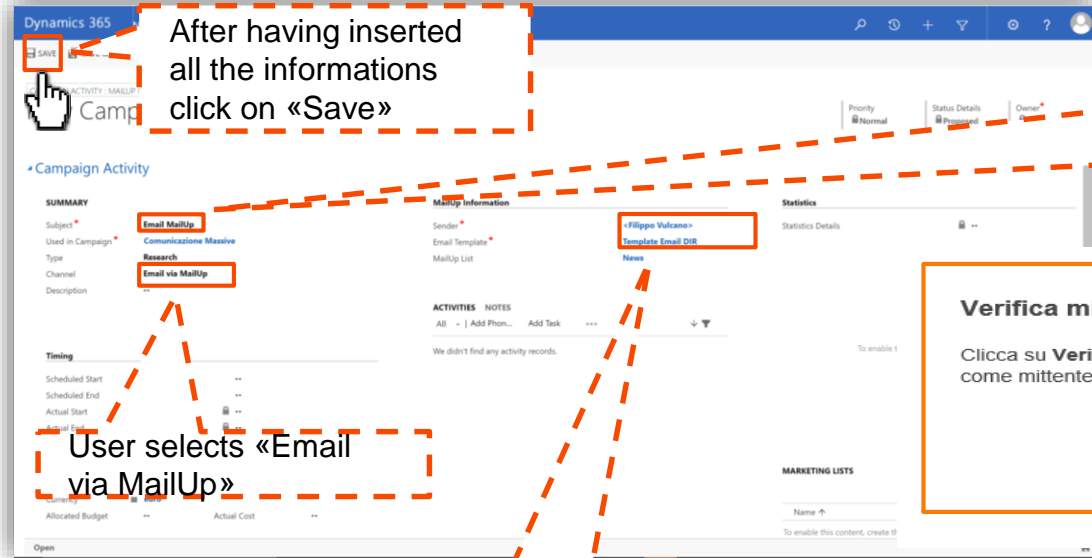
- Email via MailUp
- SMS via MailUp

The screenshot displays the Dynamics 365 interface for creating a new campaign activity. The main title is "New Campaign Activity". The form is divided into several sections:

- Campaign Activity:** Shows the subject "Research" and the channel "Email via MailUp" (highlighted with a red box).
- MailUp Information:** Includes fields for Sender, Email template, and MailUp List.
- Statistics:** Includes a link for "Statistics Details".
- ACTIVITIES NOTES:** A section for adding activities and notes.
- Timing:** Fields for Scheduled Start, Scheduled End, Actual Start, and Actual End.



MAILUP EMAIL



After having inserted all the informations click on «Save»

User selects «Email via MailUp»

User inserts sender and template to use

The subject of a campaign ACTIVITY can contain a maximum of 10 characters.

Verifica mittente

Clicca su **Verifica mittente** per confermare a.dispoto@reply.it come mittente autorizzato.

Verifica mittente

If the sender is not approved by Mailup, a validation request, that must be approved to validate the sender, will be sent during the campaign mailing phase to the email address entered.



MAILUP EMAIL

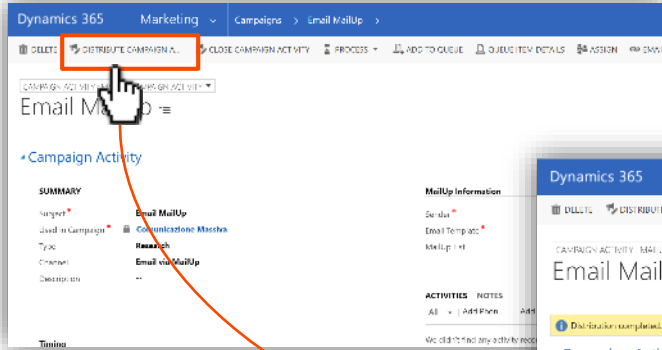
The screenshot displays the Dynamics 365 Marketing interface for an Email MailUp campaign. The top navigation bar shows 'Dynamics 365' and 'Marketing'. The main header includes 'Campaigns > Email MailUp >'. A toolbar contains various actions, with 'DISTRIBUTE CAMPAIGN' highlighted by a red box. Below the header, the campaign details are shown, including 'Campaign Activity: MAILUP CAMPAIGN ACTIVITY', 'Email MailUp', and 'Campaign Activity'. The 'SUMMARY' section lists details like Subject, Used in Campaign, Type, Channel, and Description. The 'Timing' section shows scheduled and actual start/end dates. The 'MailUp Information' section displays Sender, Email Template, and MailUp List. The 'ACTIVITIES NOTES' section shows a message: 'We didn't find any activity records.' The 'Statistics' section includes a 'Statistics Detail' link, which is also highlighted by a red box. A message below the statistics section states: 'A chart cannot be displayed because of filter criteria that you selected did not return any records.'

User can distribute tasks

System automatically populates the «statistics Details» field



ACTIVITY VIEW



Dynamics 365 Marketing > Campaigns > Email MailUp >

DELETE DISTRIBUTE CAMPAIGN ACTIVITY CLOSE CAMPAIGN ACTIVITY UPDATE STATISTICS PROCESS ADD TO QUEUE QUEUE ITEM DETAILS ASSIGN EMAIL LINK

CAMPAIGN ACTIVITY: MAILUP CAMPAIGN ACTIVITY

Email MailUp

Display: Normal

Status Details: Proposed

Owner: Filippo W...

1 Distribuzione completata

Campaign Activity

SUMMARY

Subject: Email MailUp

Used in Campaign: Comunicazione Masche

Type: Research

Channel: Email via MailUp

Description: --

Timing

Scheduled Start: --

Scheduled End: --

Actual Start: --

Actual End: --

FINANCIALS

Open

Statistics

Statistics Details

Statistics Detail

A chart cannot be displayed because the flow or filter criteria that you selected did not return any records.

MARKETING LISTS

ACTIVITIES NOTES

All | Add Photo | Add Task

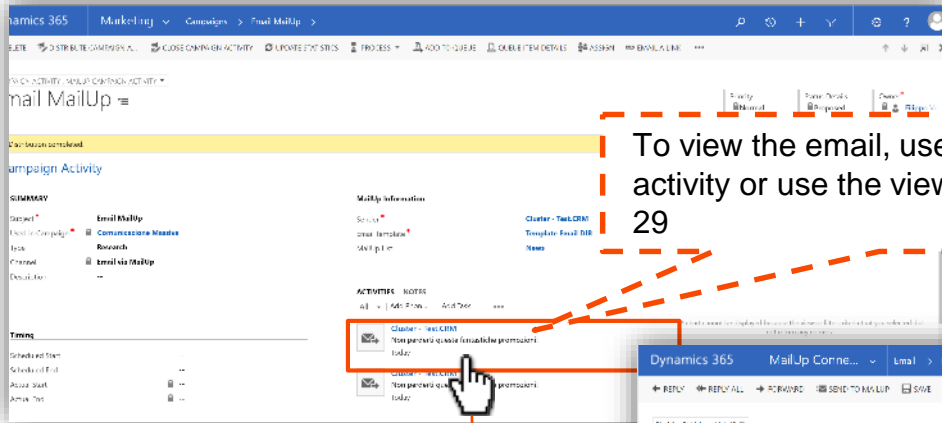
Cluster - Test CRM
Non perderti queste fantastiche promozioni!
Delivered
Today

Cluster - Test CRM
Non perderti queste fantastiche promozioni!
Delivered
Today

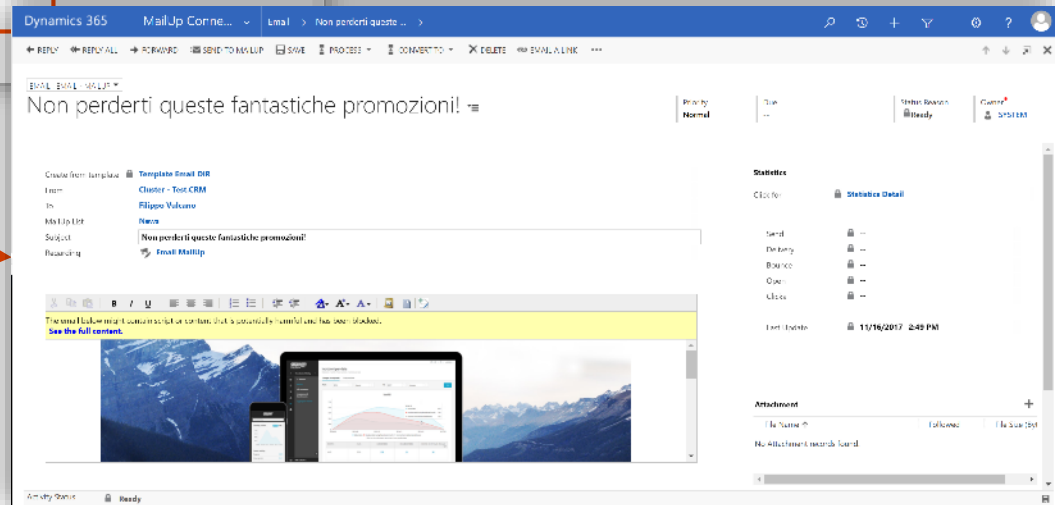
System creates its records within the activity section



EMAIL VIEW



To view the email, user can open the activity or use the view described in slide 29



In the Light version, you can not send emails associated with campaigns; This feature is available with PRO version of the connector.



CAMPAIGN ACTIVITY STATISTICS

The screenshot shows the 'Campaign Activity' page for 'TEST CWA'. A dashed orange box highlights the 'Campaign Activity' section, with the text 'User can view the details' overlaid. A red box highlights the 'Statistics' link, and a hand cursor points to it. Below the link, a small bar chart titled 'Statistics Detail by Operation' is visible, showing counts for Click, Open, and Send.

TEST CWA

Statistics

Statistics Detail

Statistics Detail by Operation

Operation	Count
Click	6
Open	4
Send	2

The screenshot shows the 'Statistics Detail' page for 'Campaign: Campaign - TEST'. It displays a summary of statistics and two charts: a bar chart for 'Statistics Detail by Operation' and a pie chart for 'Clicks by URL'. The bar chart shows counts for Click (6), Open (4), and Send (2). The pie chart shows the distribution of clicks across three URLs.

Statistics Detail

Statistics

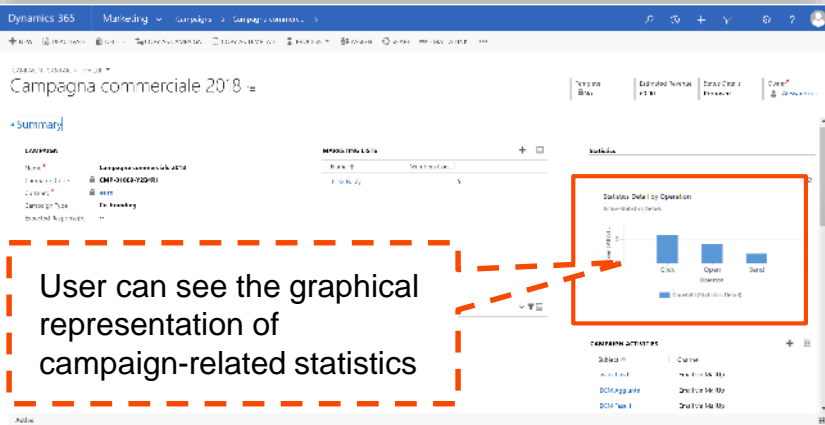
Clicks by URL

Operation	Count
Click	6
Open	4
Send	2

URL	Count
https://www.google.com/	3
https://www.facebook.com/	2
https://www.twitter.com/	1



CAMPAIGN STATISTICS



User can see the graphical representation of campaign-related statistics

Dynamics 365 Marketing Campaigns Campagna commerciale

Statistics Details

To see the detail, you can use the 'Statistics Details' box associated to the campaign

Operation	Value	Percentage	Count	Created On	Created By
Click	100	100%	100	10/10/2019	System
Open operation	50	50%	50	10/10/2019	System
Send	20	20%	20	10/10/2019	System



SUBSCRIPTIONS



SUBSCRIPTIONS

It is possible to view the subscriptions associated to a given Mailup list and to a reference entity (Account, Contact or Lead) by the module of the same entity

The image consists of two screenshots from the Dynamics 365 interface. The left screenshot shows the 'Subscriptions' tab selected in the navigation pane. The right screenshot shows the 'Subscription Associated View' table with a row highlighted.

Left Screenshot: Dynamics 365 - Accounts, Contact or Leads

The navigation pane on the left shows the 'Subscriptions' tab selected. The main content area displays the 'Statistics Details' for the selected entity. The 'Account Name' is 'Colto Winery (samp)' and the 'Email' is 'alex.life85@gmail.com'. The 'Address' is '7185 Brook Lane, Renton, WA 98175, U.S.'. The 'Product question (sample)' is 'Case: Closed by System Administrator for Contact Jim Gynn (sample)'. The 'Service requested (sample)' is 'Case: Created by System Administrator for Contact Jim Gynn (sample)'. The 'Product question (sample)' is 'Case: Created by System Administrator for Contact Jim Gynn (sample)'. The 'Alex Life' contact is 'Contact: Created by System Administrator. On Alex Life's wall. 6/20/2017 5:55 PM'. A bar chart shows 'Active Statistics Details' with a value of 3.

Right Screenshot: Dynamics 365 - Subscription Associated View

The 'Subscription Associated View' table shows the following data:

Mailup List	Subscribed E...	Subscribed S...	Created On
News	Yes	No	12/13/2017 1:13 PM

To view the subscription details, the user selects the «Subscriptions» box associated with the Accounts, Contact or Leads

User can select a Subscription record from the associated view



SUBSCRIPTIONS

User displays if
an Account,
Contact or Lead
has an email
and/or SMS
subscription.

Dynamics 365 Sales > Contacts > New Subscription

SUBSCRIPTION : INFORMATION
New Subscription

General

Mallup List: News

Account: --
Contact: Alex Life
Lead: --

OPTIN-OPTOUT

Subscribed Email	Yes	Optin Email	7/4/2017
Subscribed SMS	No	Optout Email	--
		Optin SMS	--
		Optout SMS	--

Administration

Upsert Key: 0eed8ba3-d56b-e711-80dd-001dd8b72084;contact:1eebdebb-d055-e711-80dd-001dd8b72084
Created By: Francesco Milone
Modified By: Valerio Arcerito
Created On: 12/13/2017 1:13 PM
Modified On: 3/29/2018 6:42 PM
Name: --

Active

Subscriptions
are updated
daily



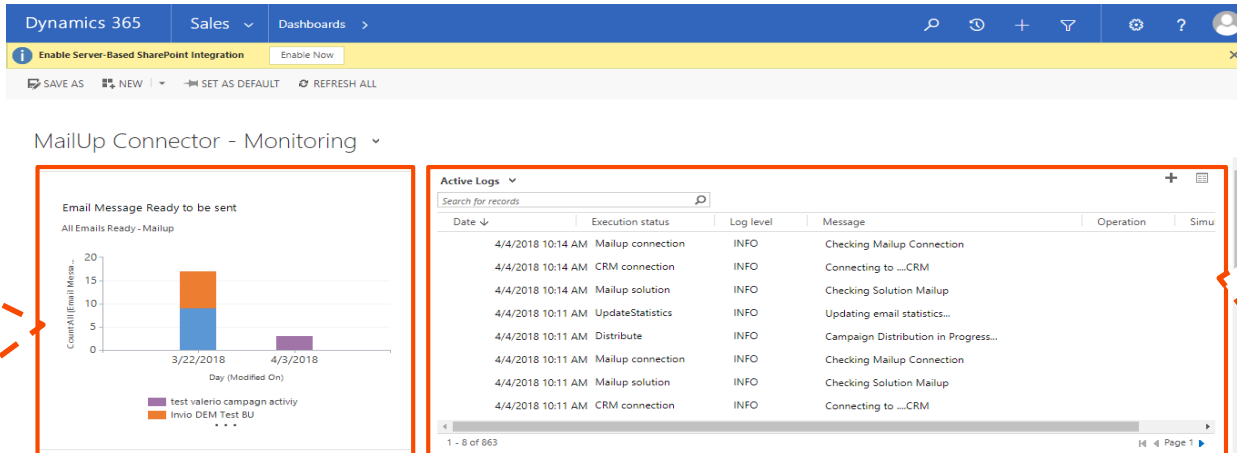
DASHBOARDS



DASHBOARDS

User displays the Mailup Connector Dashboards, that show the status of some features of the Mailup connector, such as the Mail ready to be sent(in Ready state), the Active Logs, the number of errors sorted by date, active campaigns with distribution in progress, and the number of simultaneous operations (active logs in the last hour)

User displays, for each campaign, the Email message ready to be sent



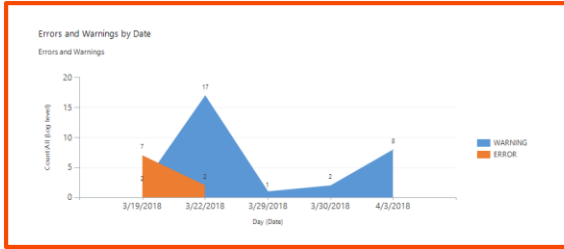
User displays the active logs view



DASHBOARDS



MailUp Connector - Monitoring

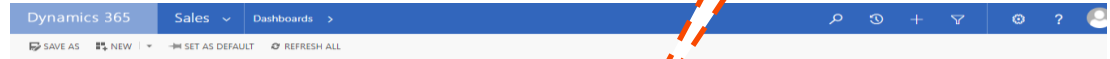


Users displays campaign activities with distribution in progress

User displays for each user, the number of email message ready to be sent

User displays errors sorted by date

User displays the simultaneous operations number (active logs in the last hour



MailUp Connector - Monitoring

