DYNAMICS 365 – MAILUP CONNECTOR

REPLY
CLUSTER

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1 Introduction

2 Navigation Path

3 Account/List configuration

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6 Single Sends

7 Campaign Configuration

8 Subscriptions

9 Dashboards

INTRODUCTION

INTRODUCTION

DYNAMICS 365 – MAILUP CONNECTOR

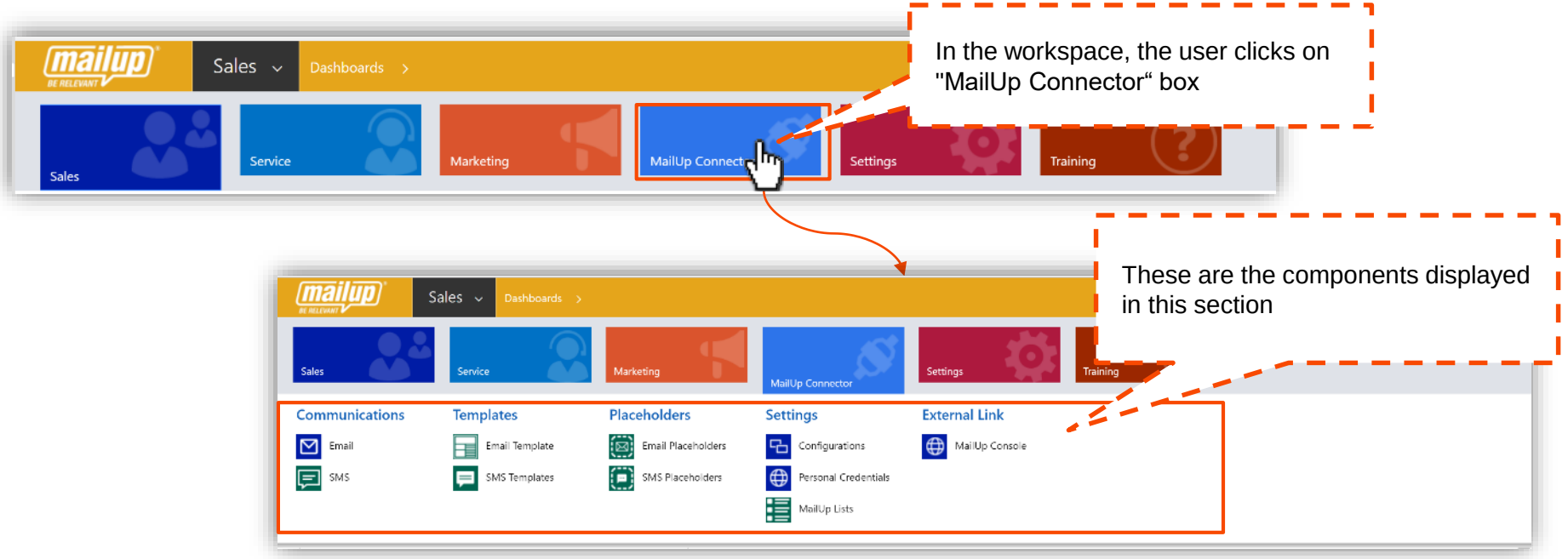
In this manual we represent and detail all features related to the installation of the new component «**Dynamics 365 – MailUp Connector**» within Microsoft Dynamics 365

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

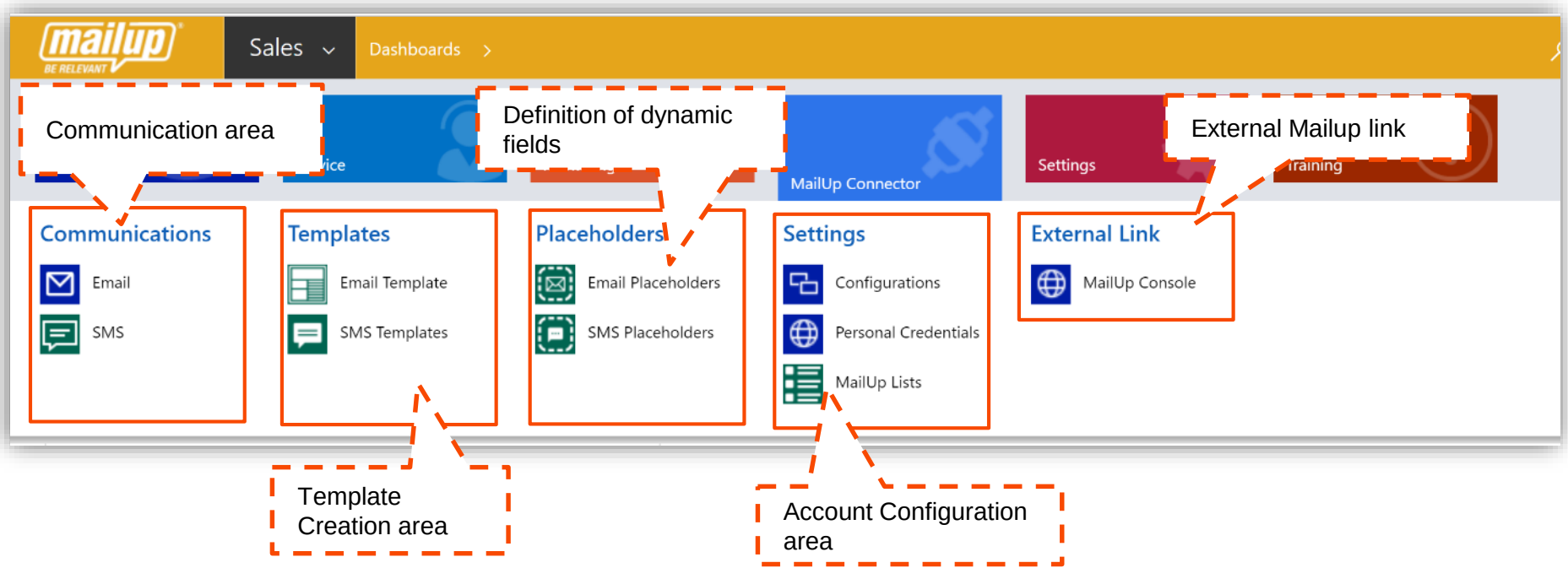
NAVIGATION PATH

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.



MAILUP CONNECTOR SECTIONS

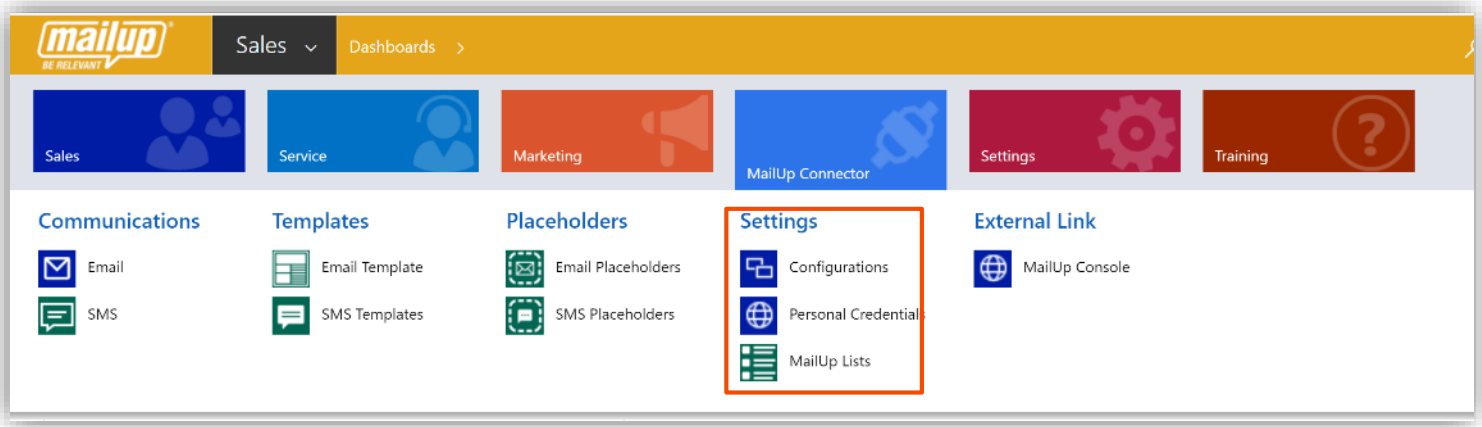


ACCOUNT/LIST CONFIGURATION

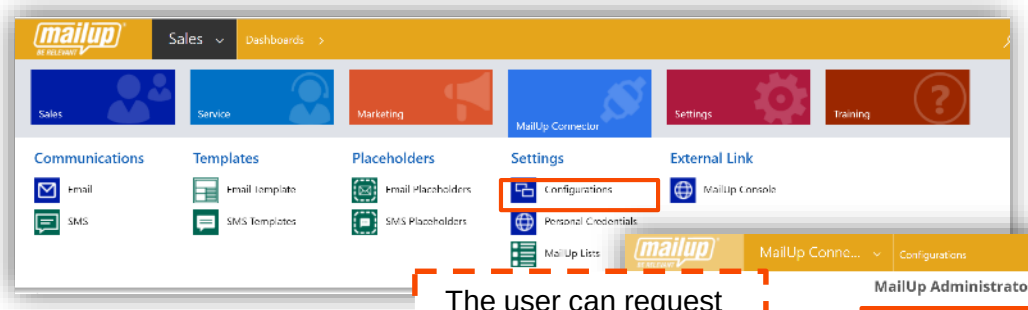
SETTINGS

Within the configuration section user can:

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



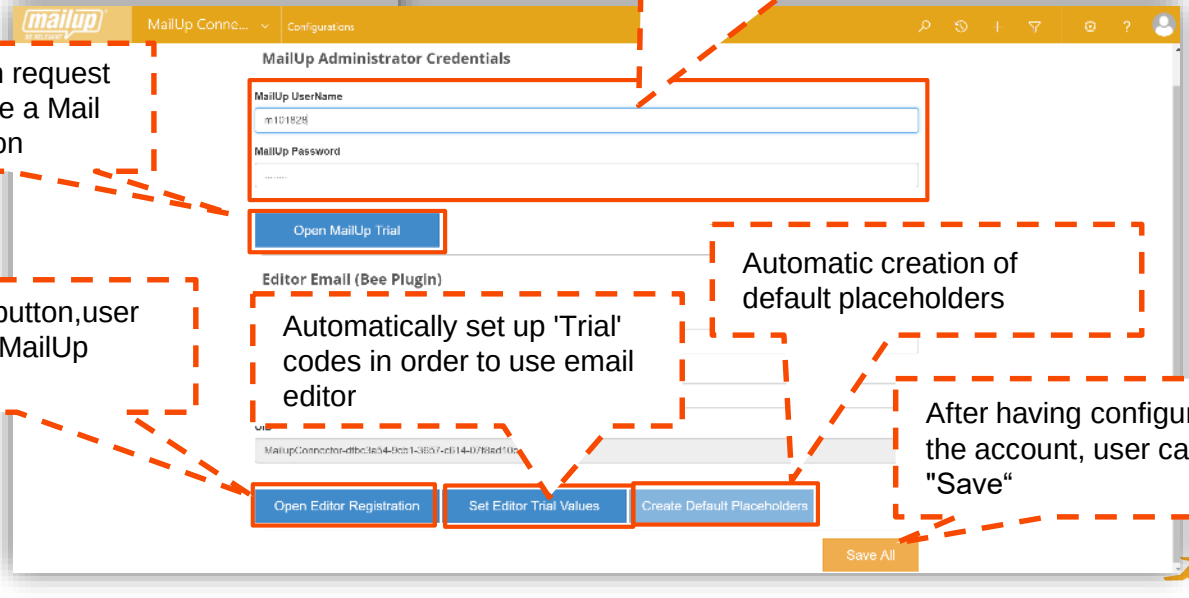
ACCOUNT ADMINISTRATOR



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

The user can request and associate a Mail up test version

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



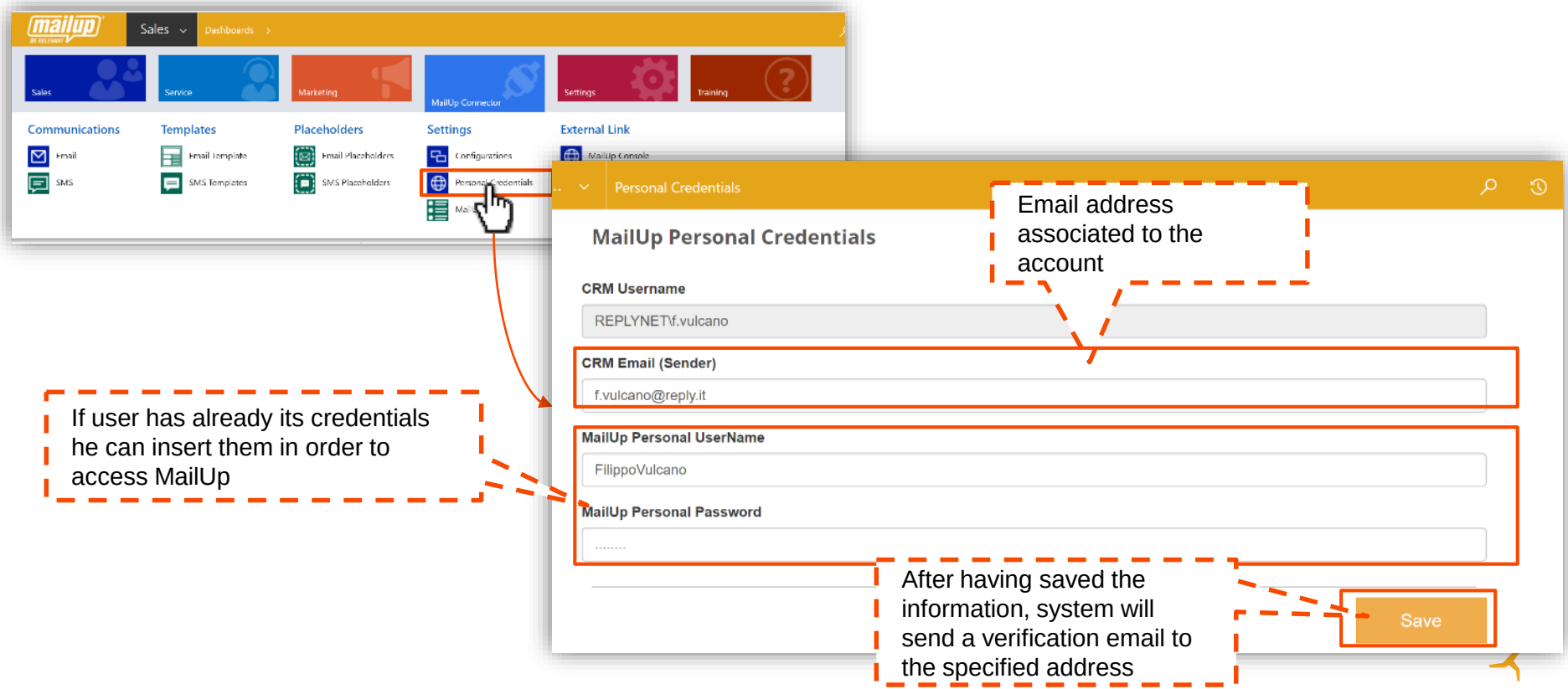
By clicking the button,user can embed the MailUp email editor

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

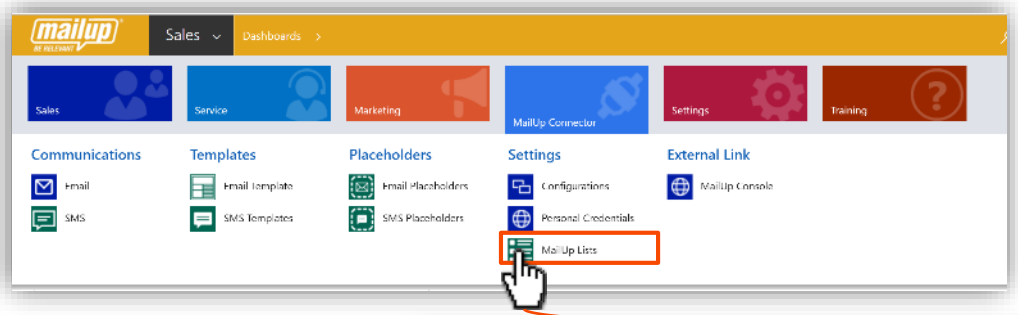
Automatic creation of default placeholders

After having configured the account, user can "Save“

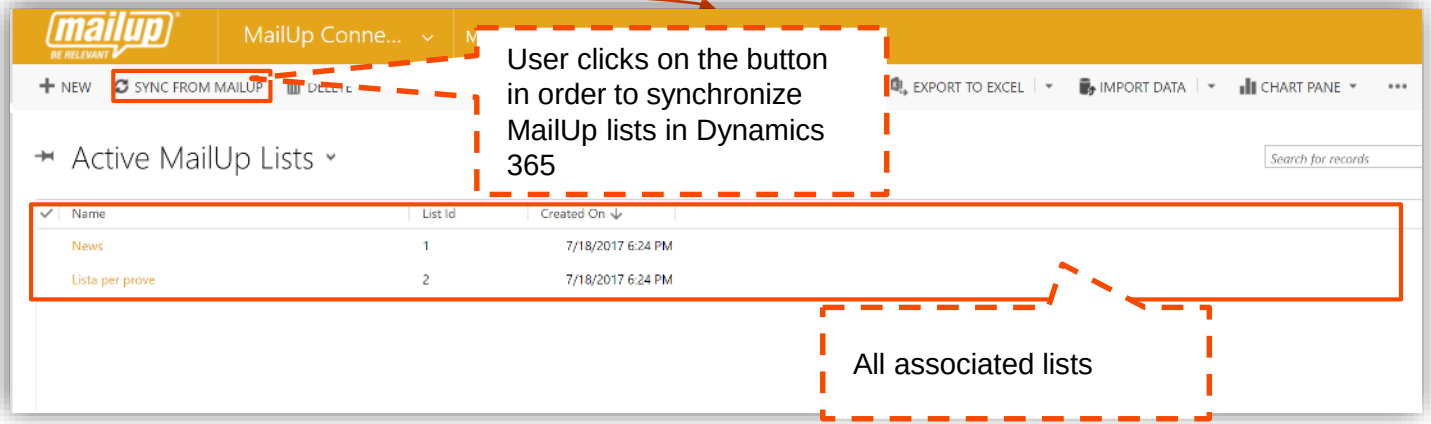
PERSONAL CREDENTIALS



VIEW MAILUP LISTS



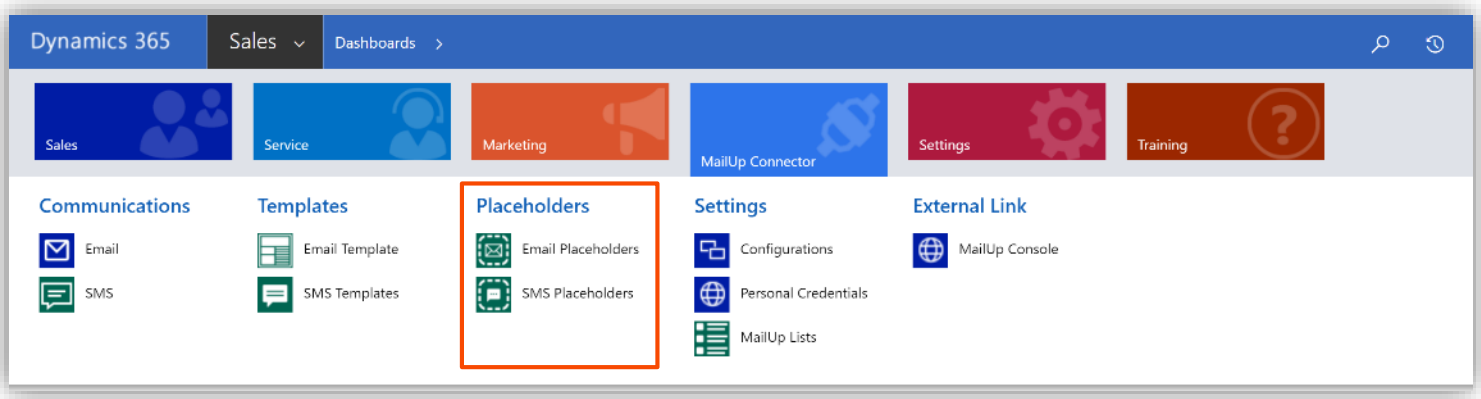
The synchronization list is automatic only for “Pro” version



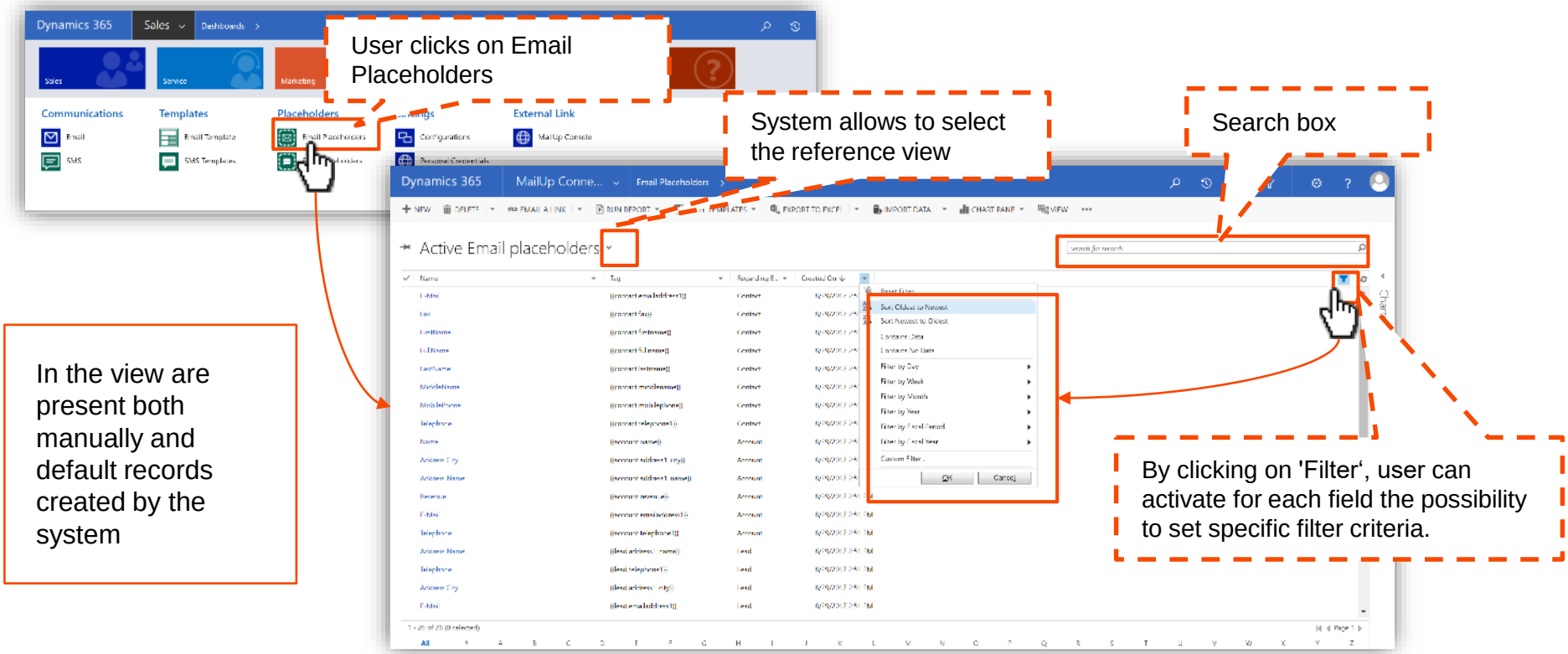
PLACEHOLDERS

PLACEHOLDERS

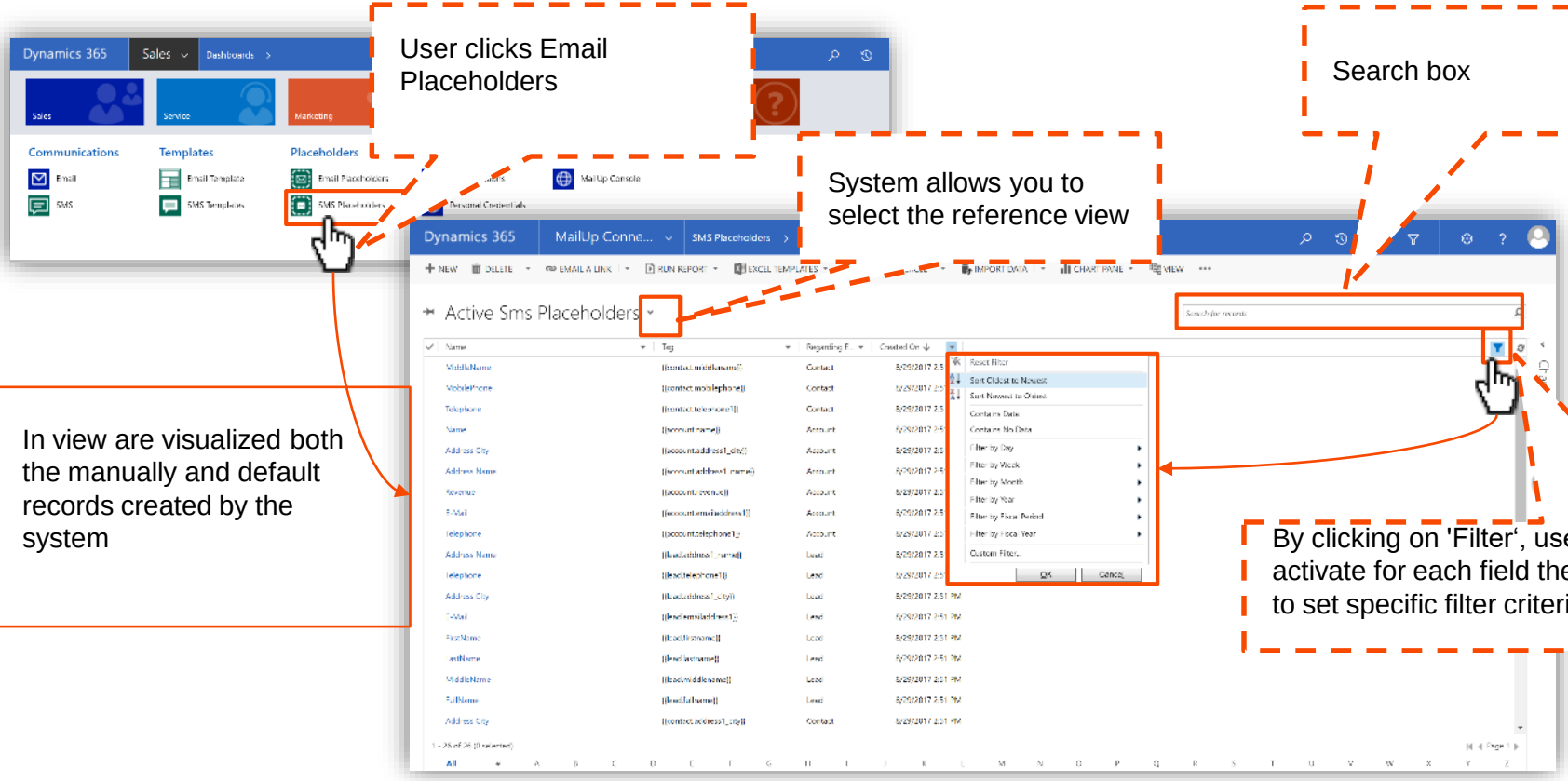
In Placeholders section, user can visualize and add new dynamic fields in order to use them for templates. Dynamic fields are related to Accounts, Lead and Contact entities of Microsoft Dynamics 365



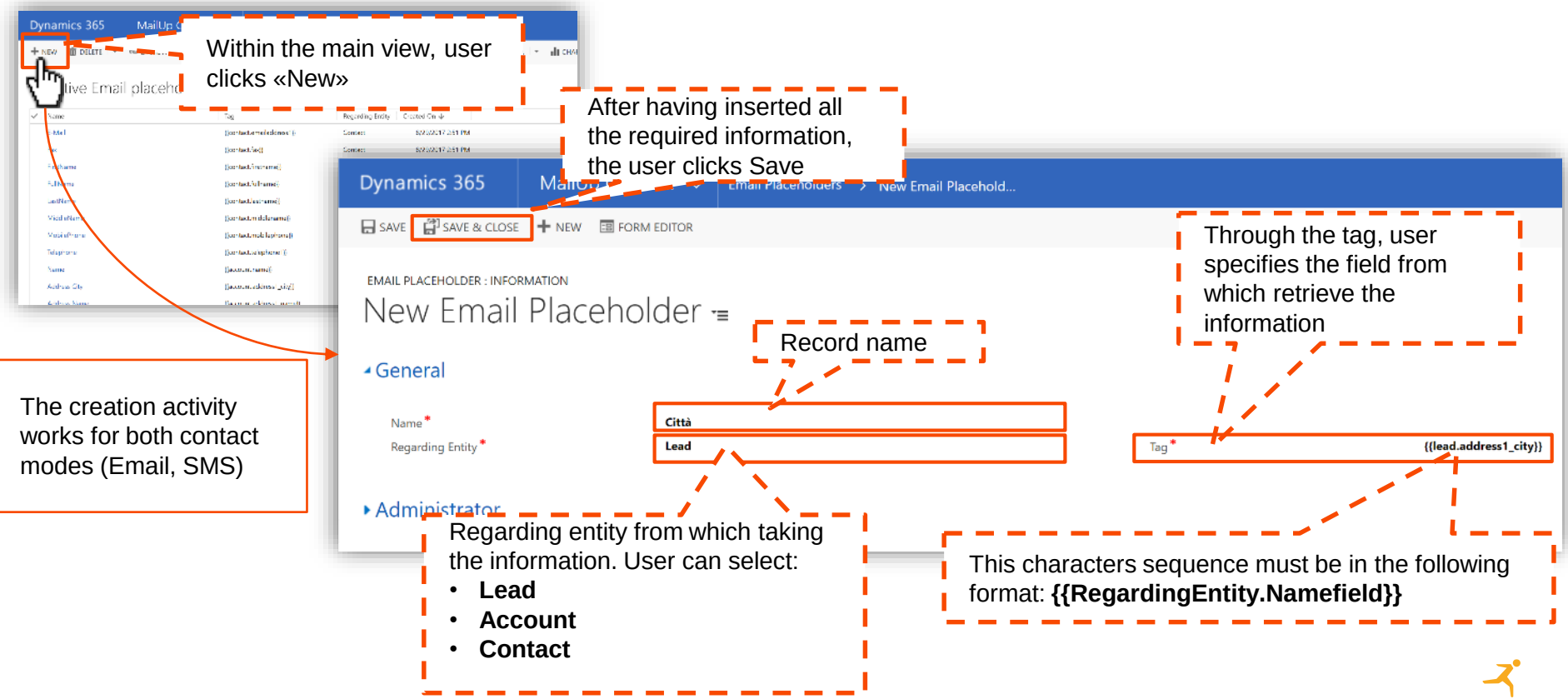
EMAIL PLACEHOLDER



SMS PLACEHOLDER



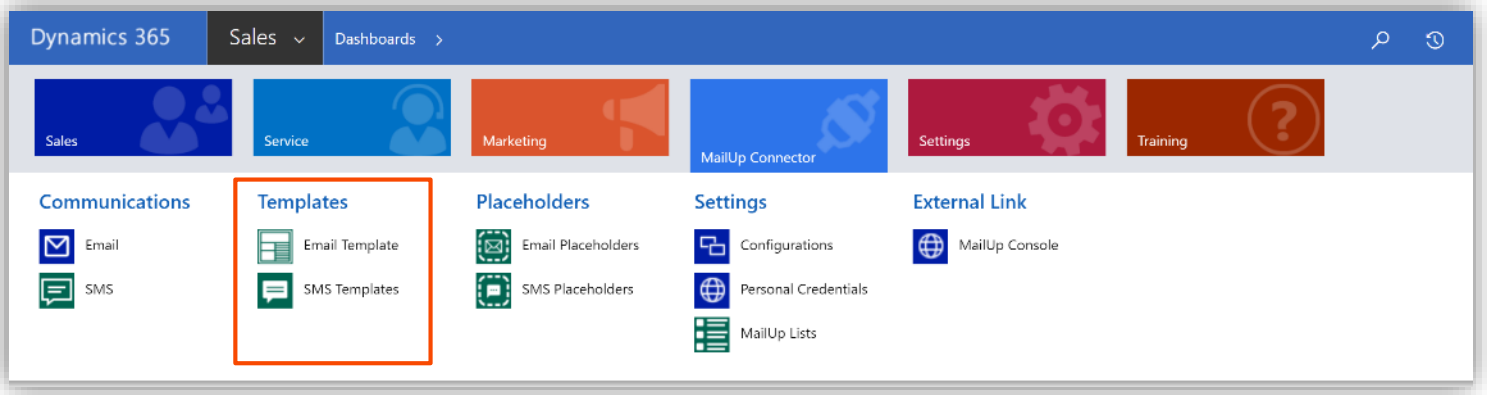
CREATING A NEW PLACEHOLDER



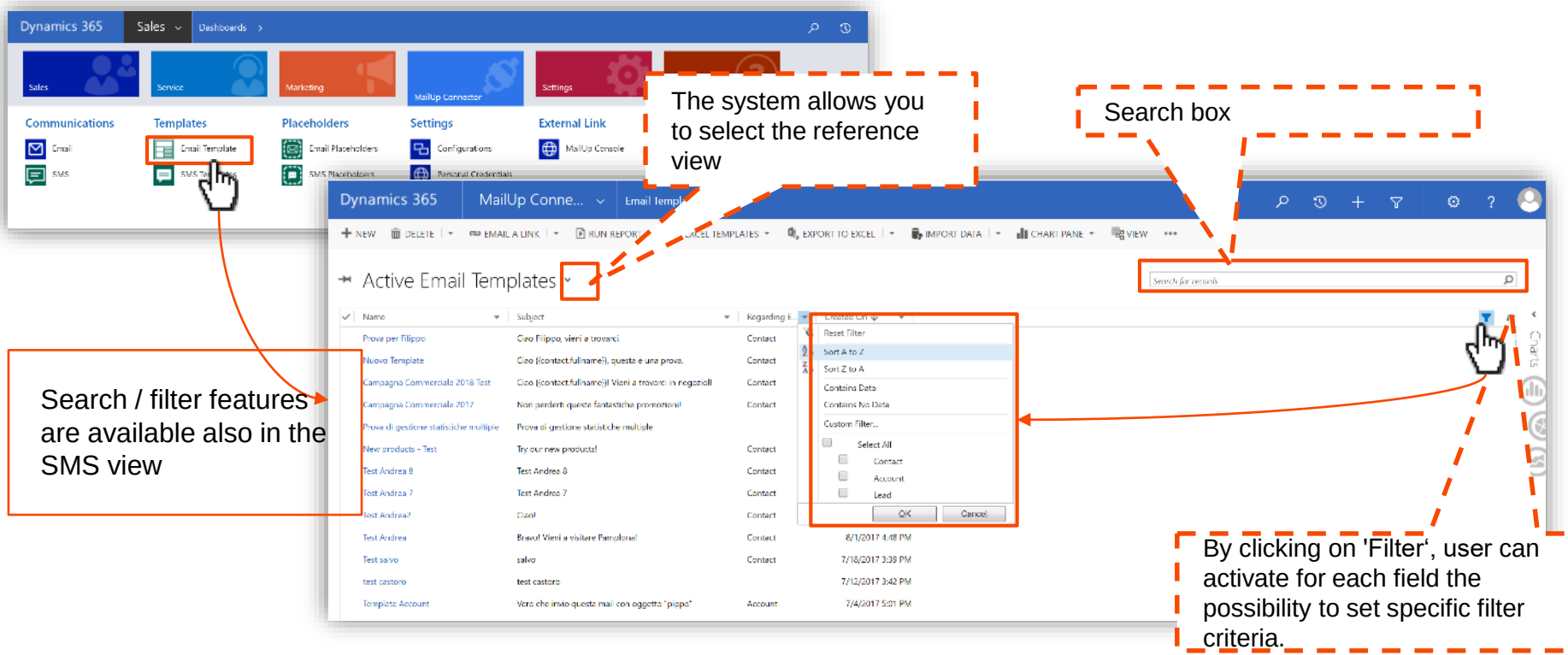
TEMPLATE GENERATION

TEMPLATES

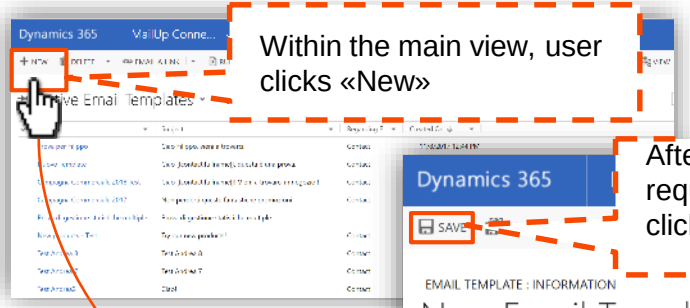
Within the Templates area, user can view all templates or create other ones in order to use them in Email or SMS communications.

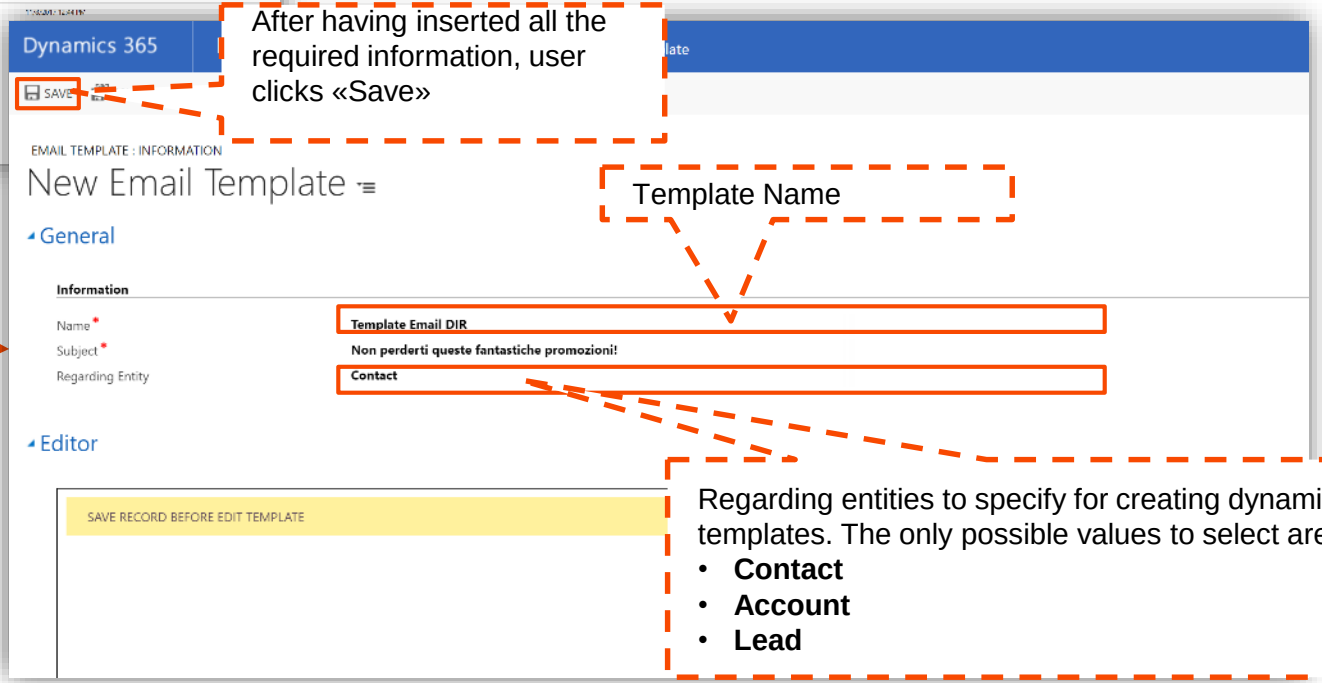


TEMPLATE VIEW



CREATE EMAIL TEMPLATE





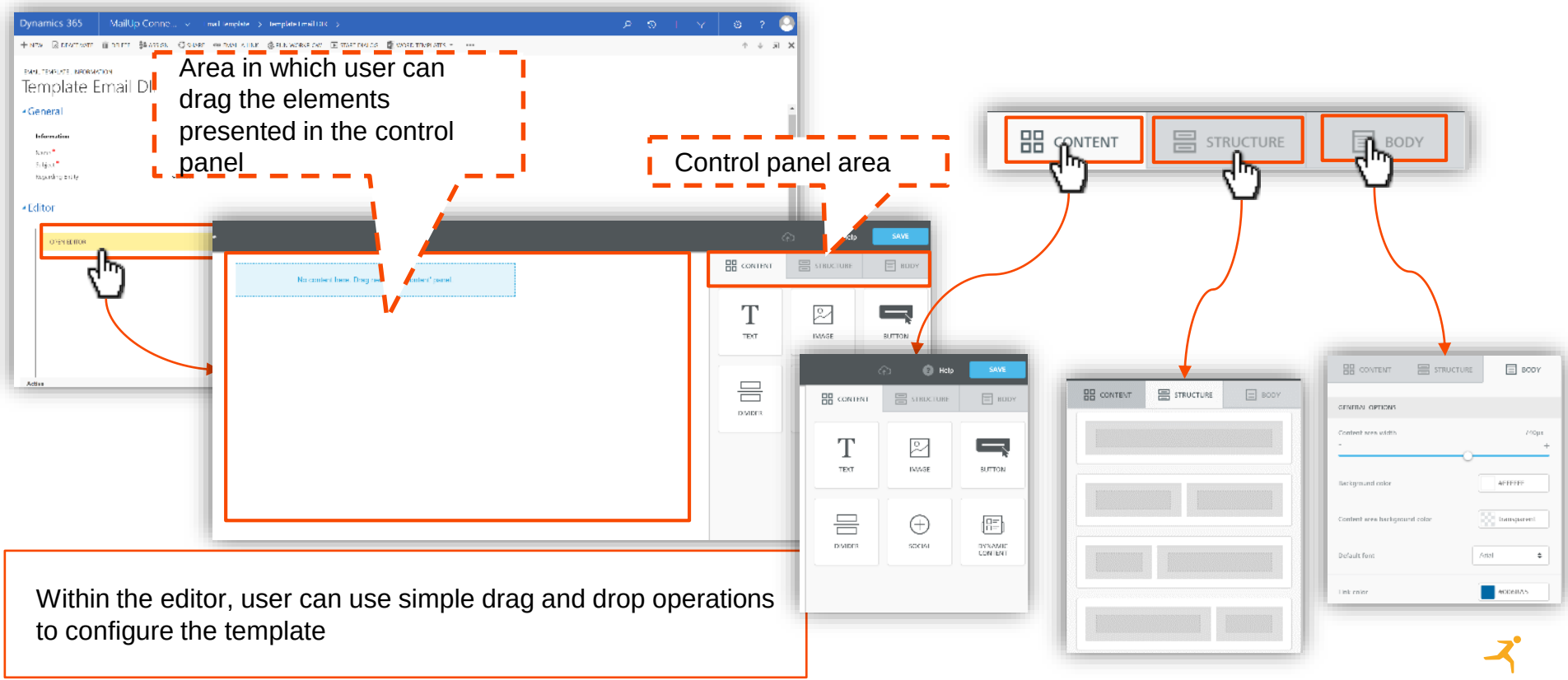
Template Name

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

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

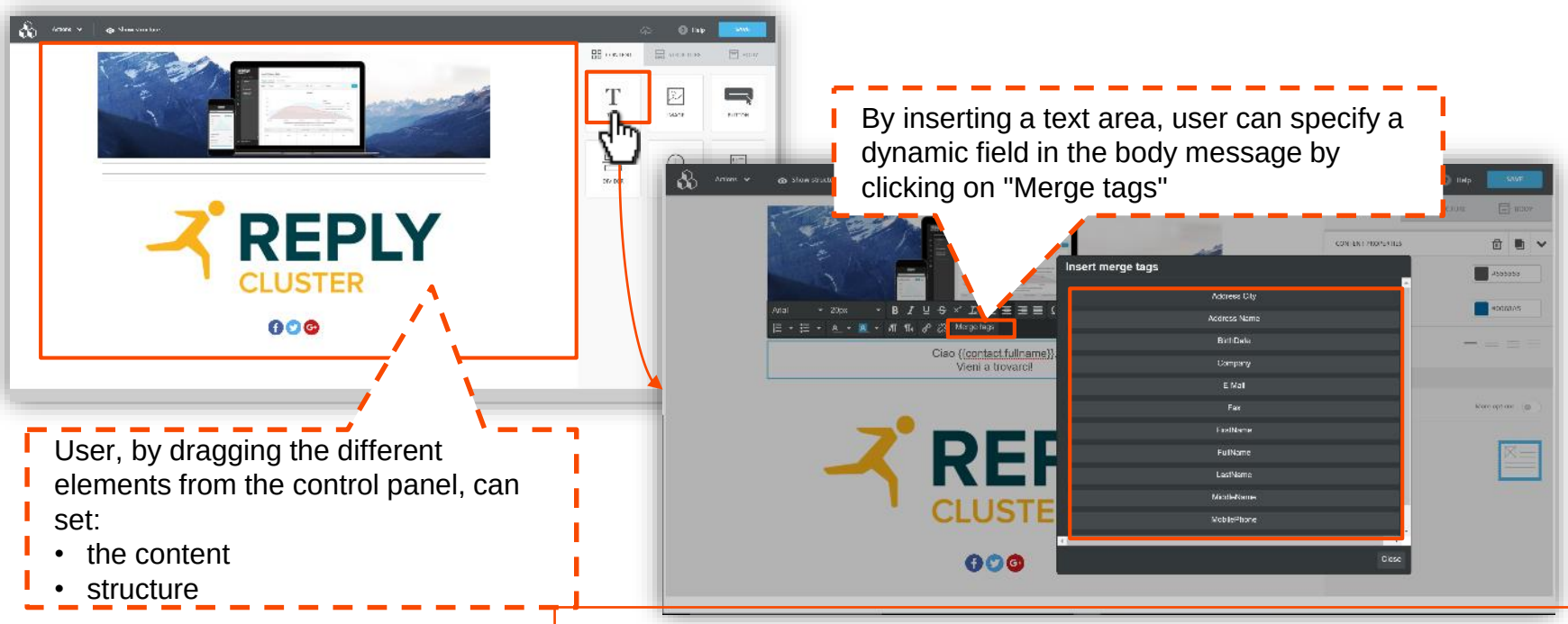
- **Contact**
- **Account**
- **Lead**

OPEN EDITOR EMAIL



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

DRAG AND DROP EMAIL



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

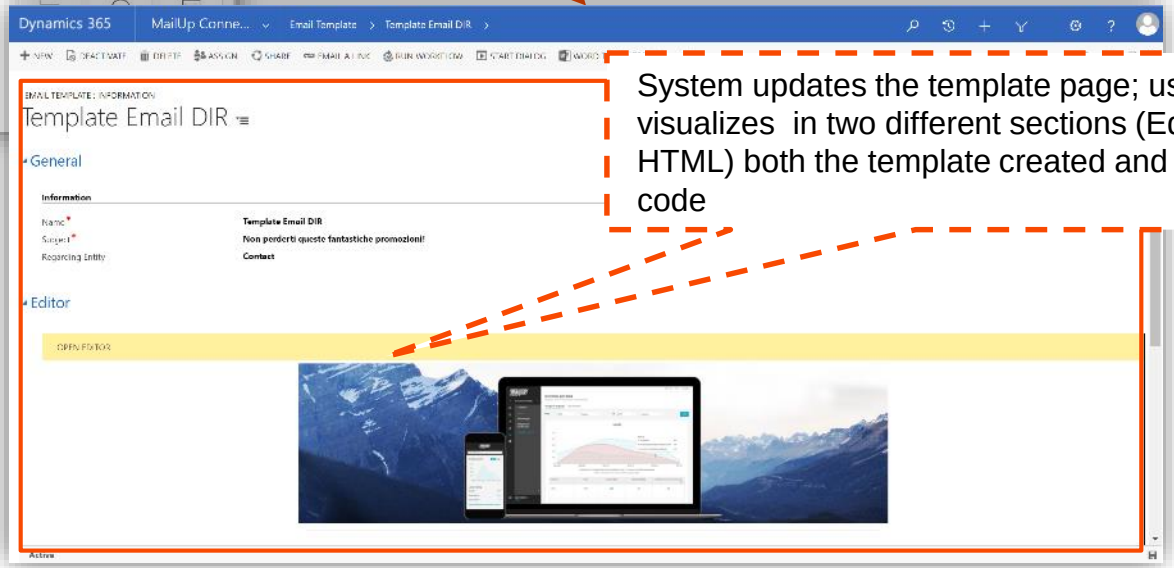
User, by dragging the different elements from the control panel, can set:

- the content
- structure

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

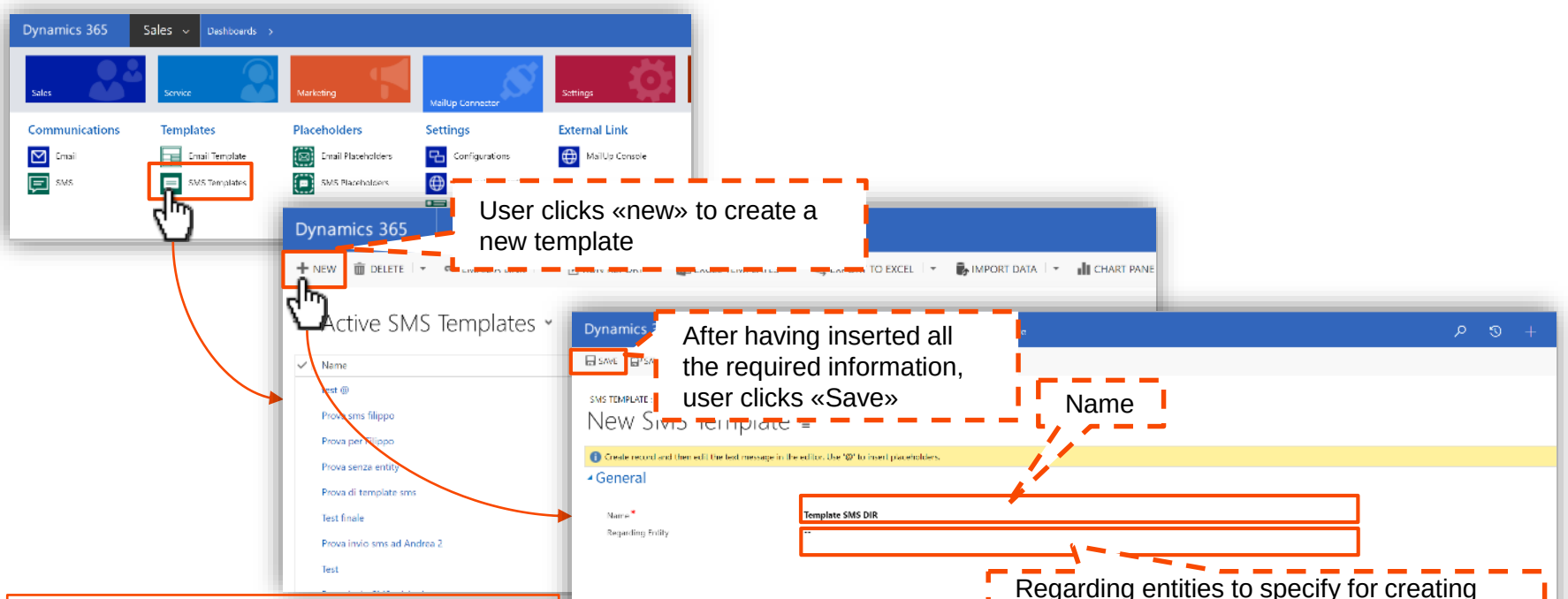
After having configured the template, user clicks on «Save»



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

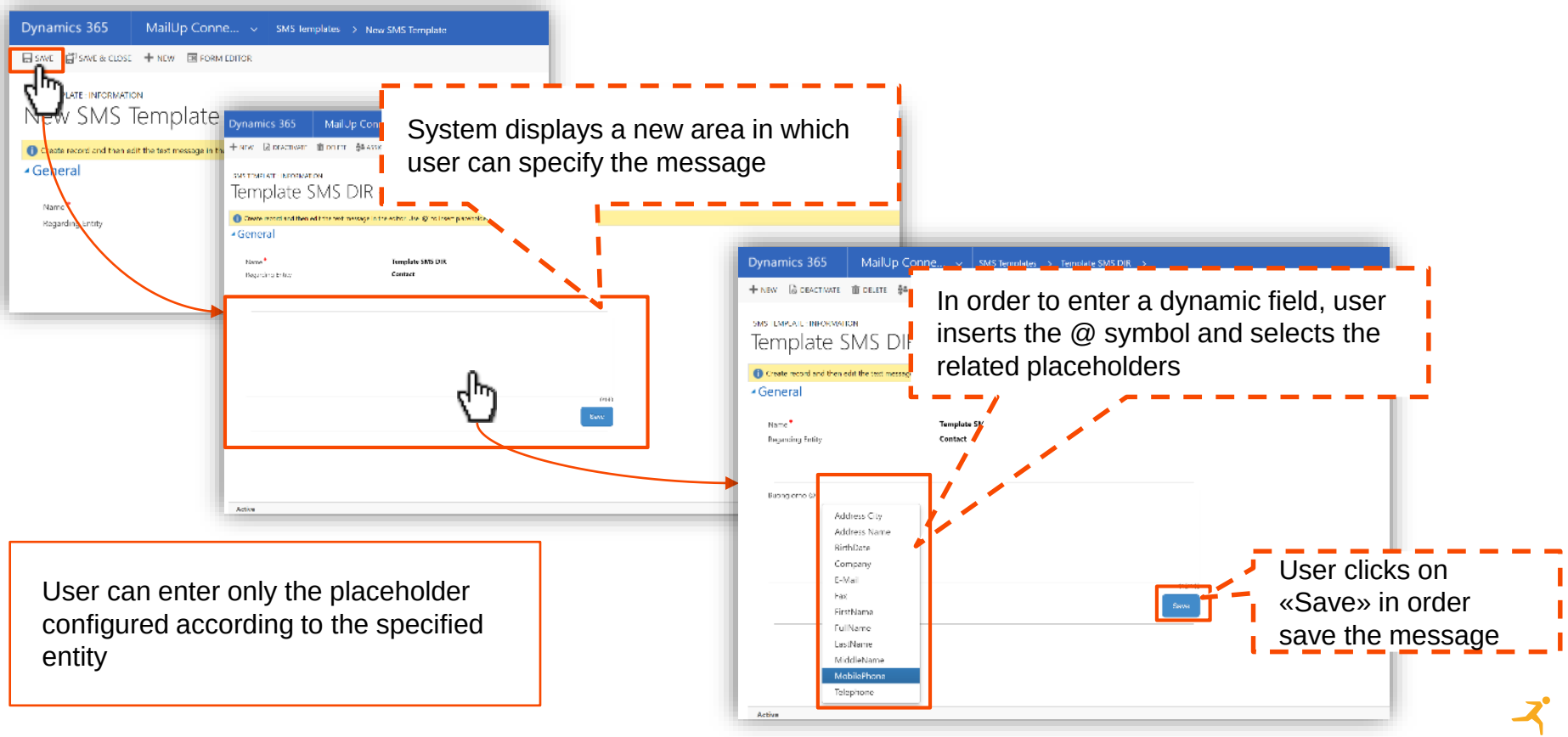
Once created and saved, contents and images loaded in the email editor are visible for each Business Unit

CREATE SMS TEMPLATE



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

MESSAGE AND DYNAMIC FIEDS

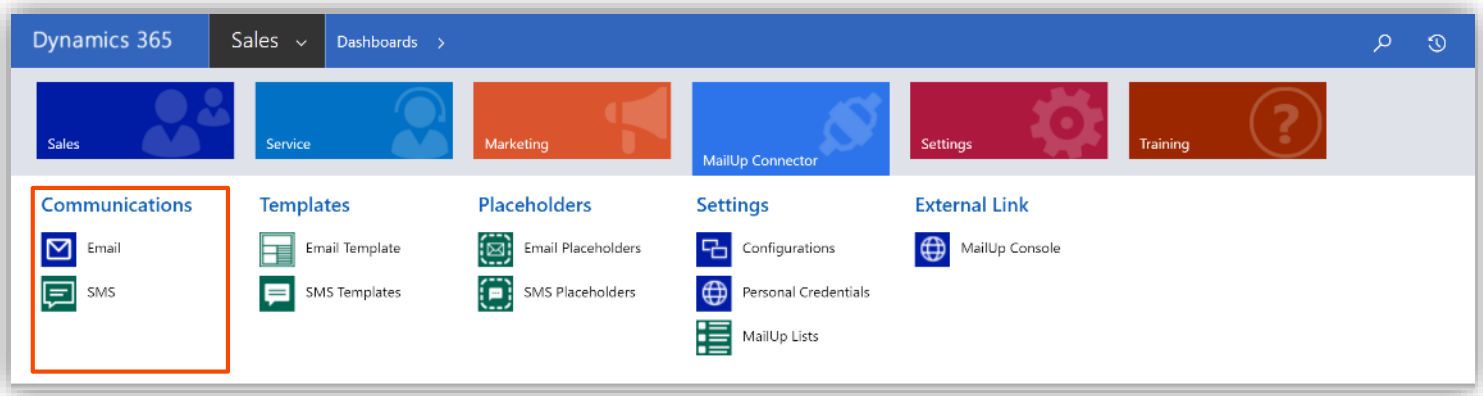


SINGLE SENDS

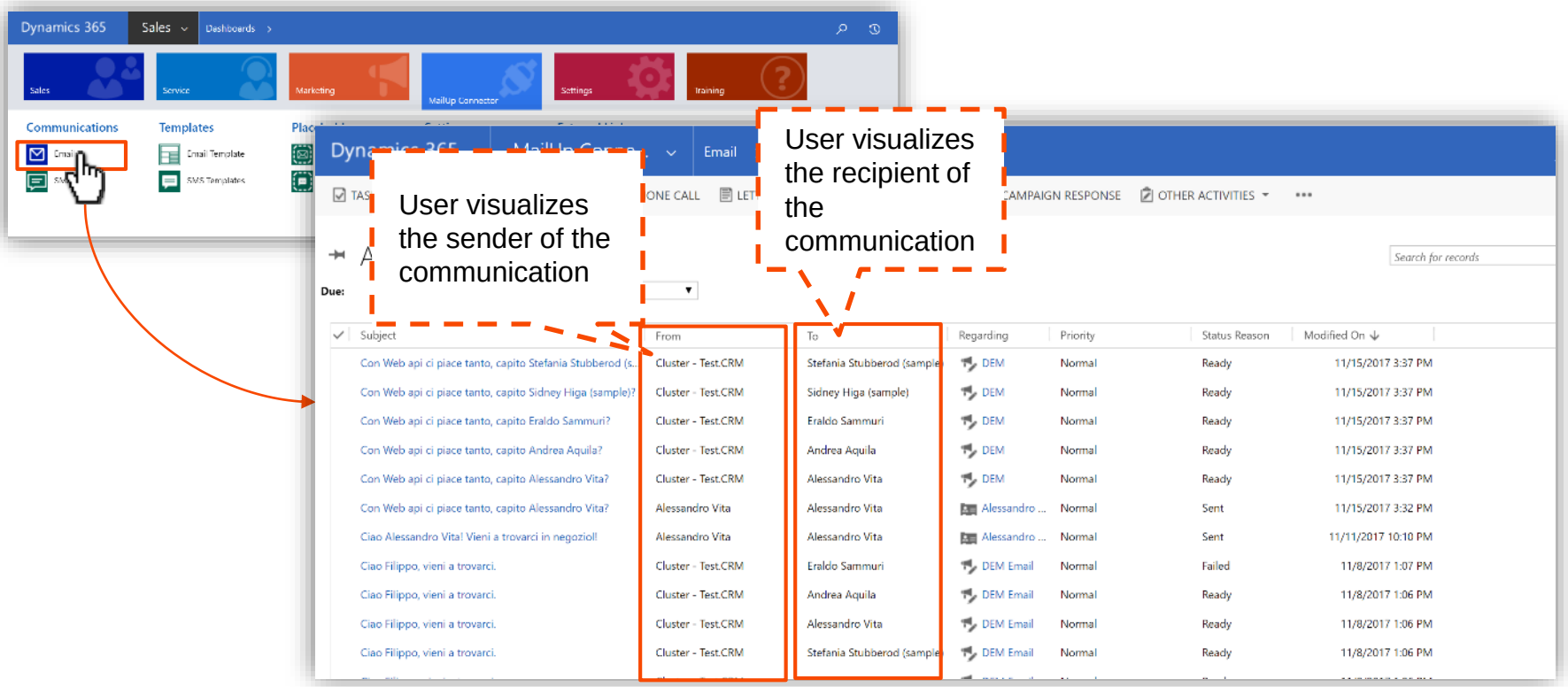
SINGLE SENDS

In communication section user can:

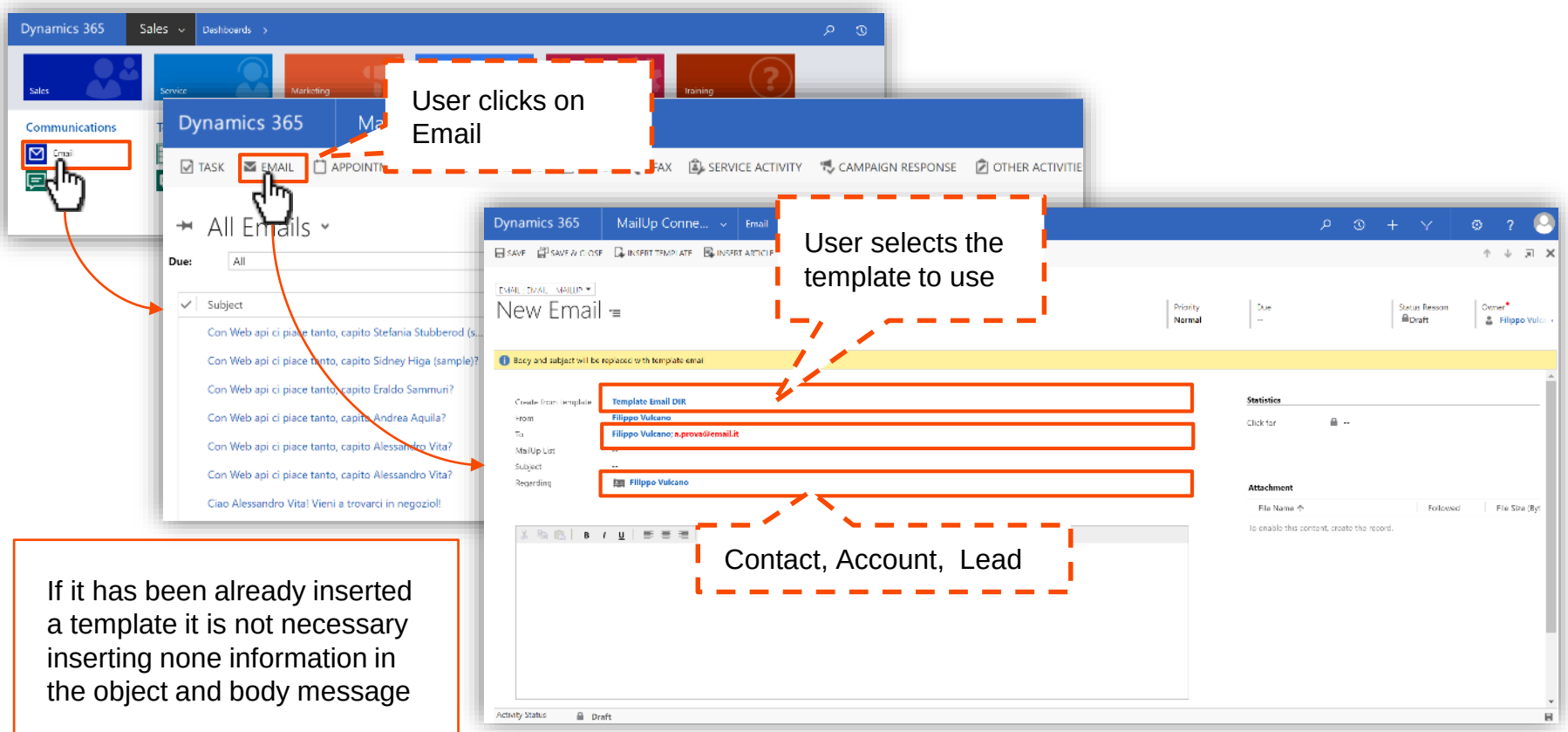
- Visualize all the email/sms managed
- Create new single email/sms



EMAIL VIEW

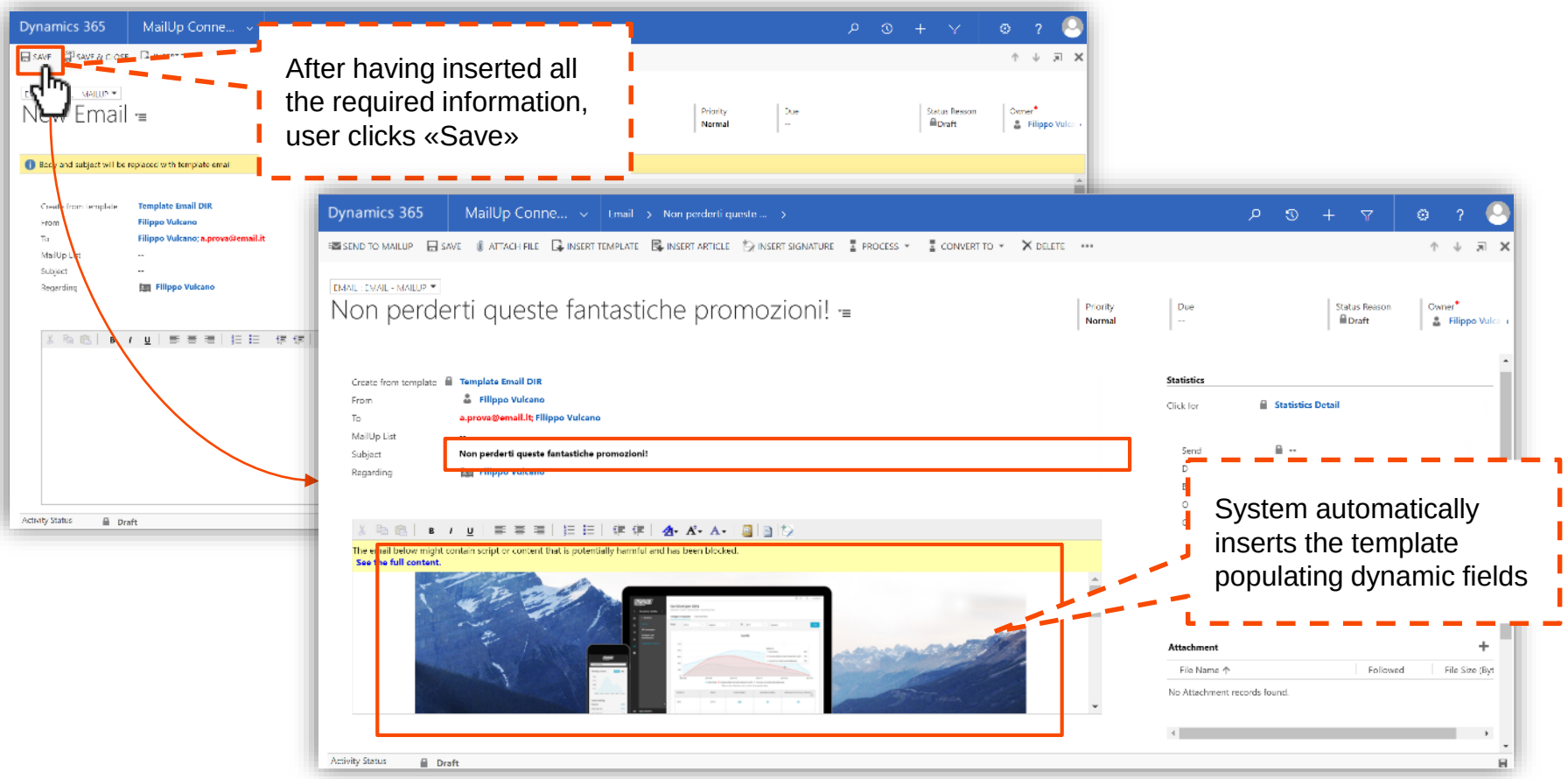

Dynamics 365
Sales
Dashboards
Communications
Templates
Email Template
SMS Templates
Email
User visualizes the sender of the communication
User visualizes the recipient of the communication
Search for records
Subject
From
To
Regarding
Priority
Status Reason
Modified On
Con Web api ci piace tanto, capito Stefania Stubberod (s...
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)?
Sidney Higa (sample)
Con Web api ci piace tanto, capito Eraldo Sammuri?
Eraldo Sammuri
Con Web api ci piace tanto, capito Andrea Aquila?
Andrea Aquila
Con Web api ci piace tanto, capito Alessandro Vita?
Alessandro Vita
Con Web api ci piace tanto, capito Alessandro Vita?
Alessandro ...
Sent
11/15/2017 3:32 PM
Ciao Alessandro Vita! Vieni a trovarci in negozio!!
11/11/2017 10:10 PM
Ciao Filippo, vieni a trovarci.
DEM Email
Failed
11/8/2017 1:07 PM
11/8/2017 1:06 PM

CREATE NEW EMAIL

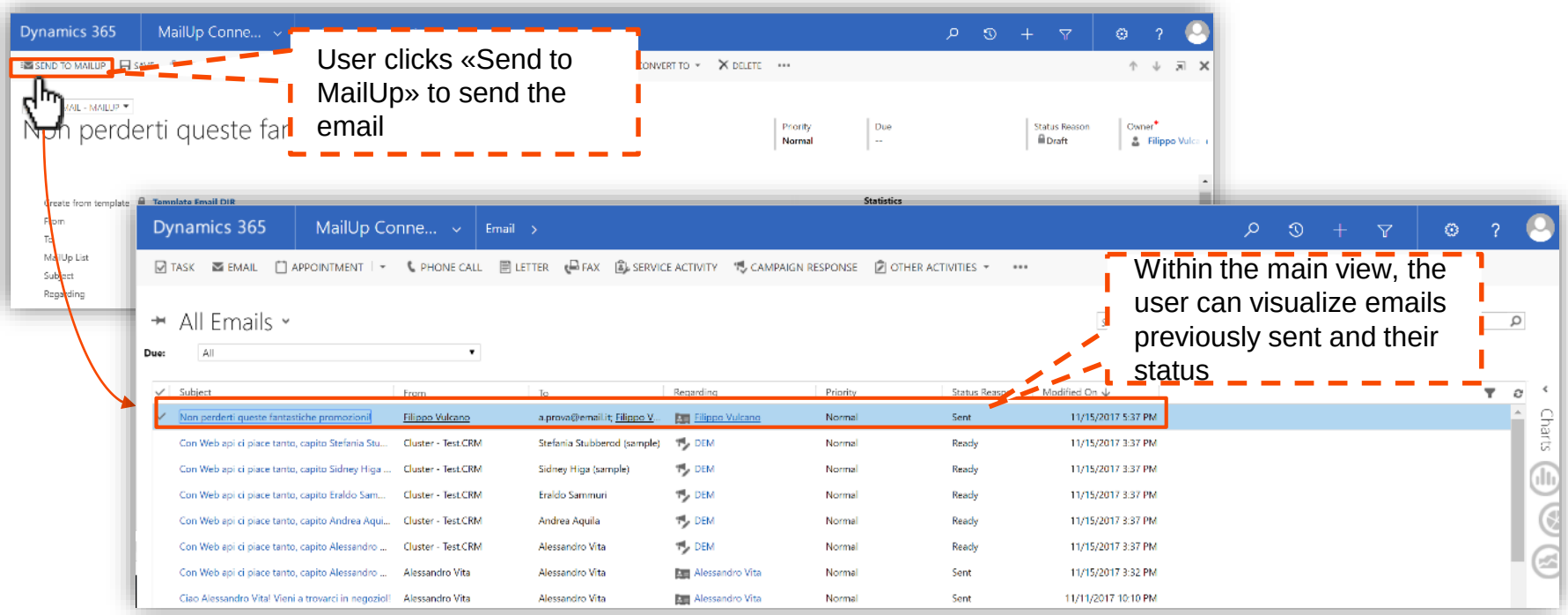


If it has been already inserted a template it is not necessary inserting none information in the object and body message

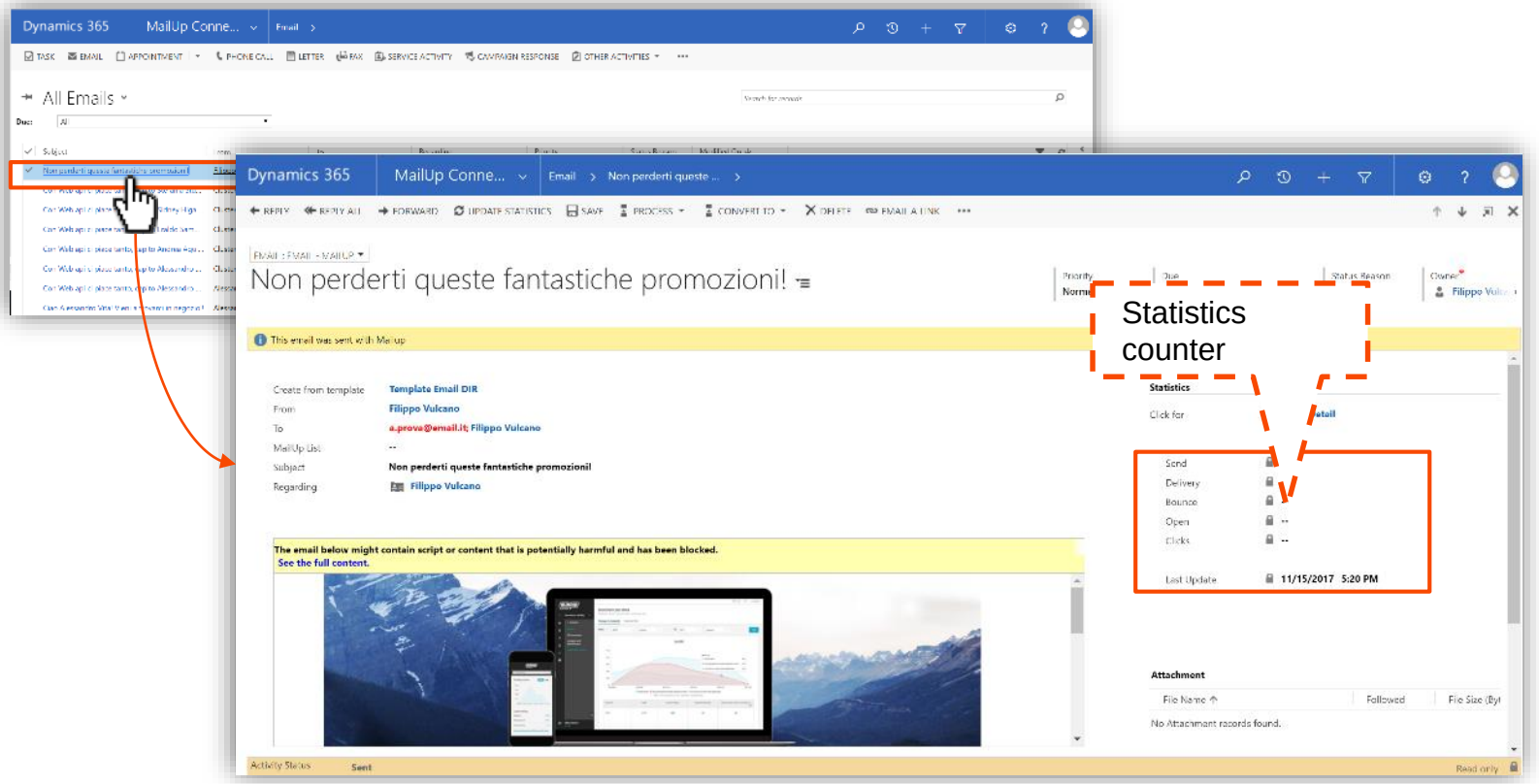
TEMPLATE ASSOCIATION



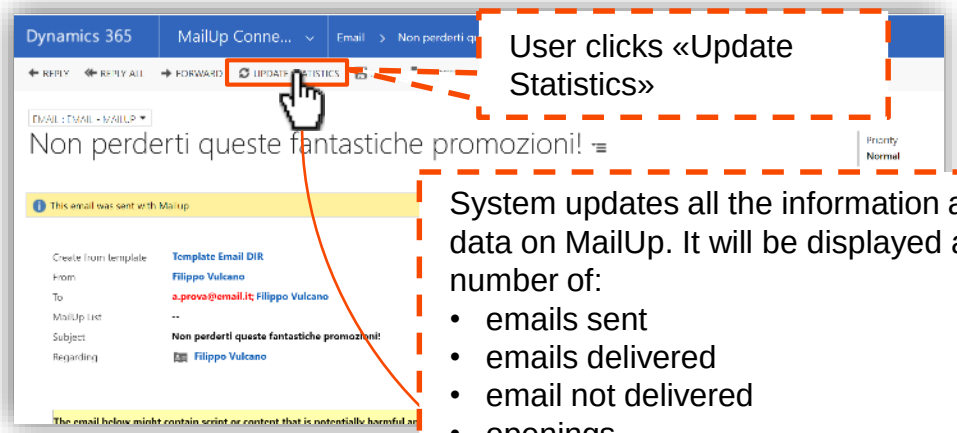
EMAIL SEND


Dynamics 365
MailUp Conne...
SEND TO MAILUP
CONVERT TO
DELETE
Priority
Normal
Due
Status Reason
Draft
Owner
Filippo Vulc
Statistics
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 5:37 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 ...
Sidney Higa (sample)
Con Web api ci piace tanto, capito Eraldo Sam...
Eraldo Sammuri
Con Web api ci piace tanto, capito Andrea Aqui...
Andrea Aquila
Con Web api ci piace tanto, capito Alessandro ...
Alessandro Vita
Con Web api ci piace tanto, capito Alessandro ...
Alessandro Vita
11/15/2017 3:32 PM
Ciao Alessandro Vita! Vieni a trovarci in negozio!
11/11/2017 10:10 PM
Within the main view, the user can visualize emails previously sent and their status
Charts

MAILUP EMAIL STATISTICS



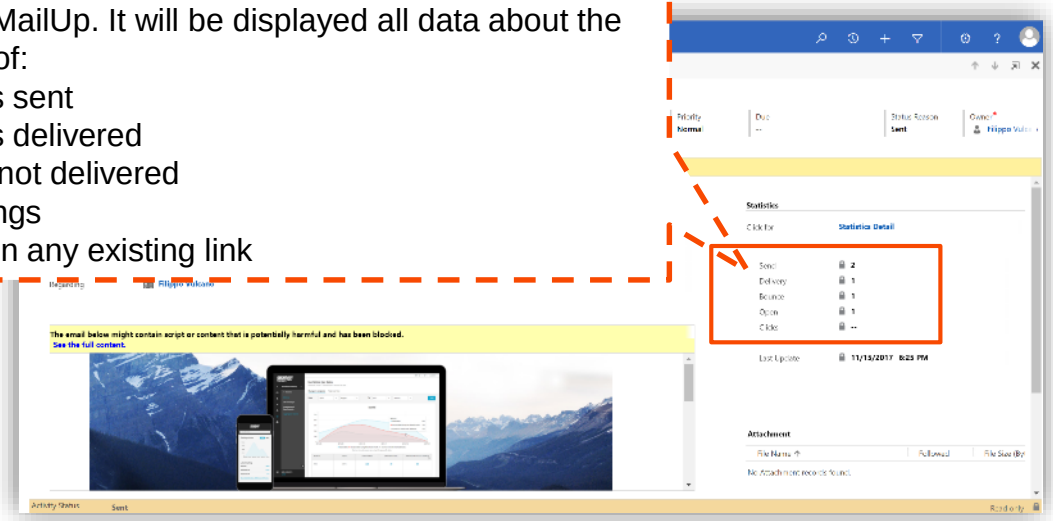
STATISTICS MAILUP UPDATE



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:

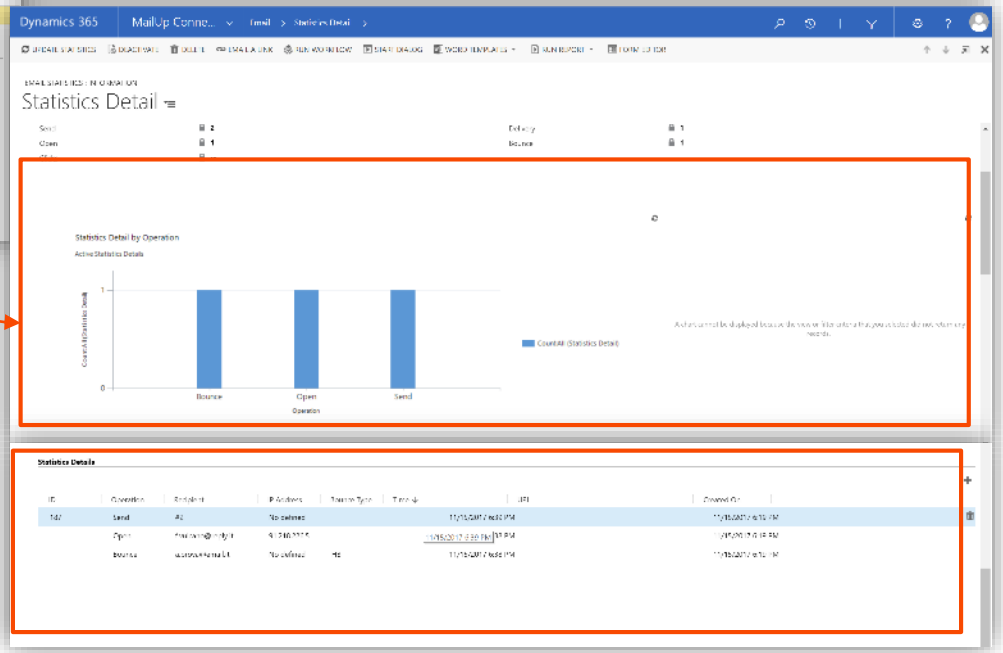
- emails sent
- emails delivered
- email not delivered
- openings
- click on any existing link



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

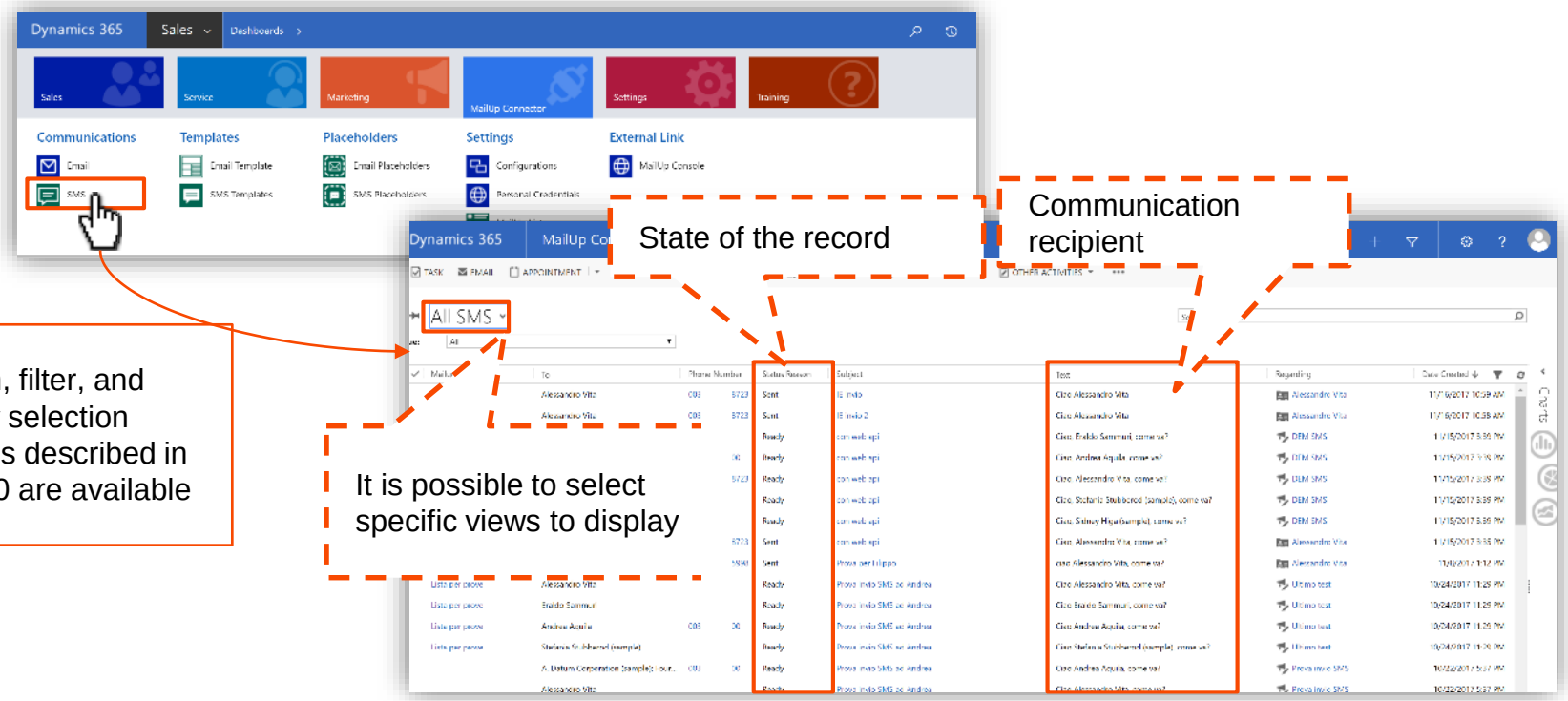
STATISTICS MAILUP

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



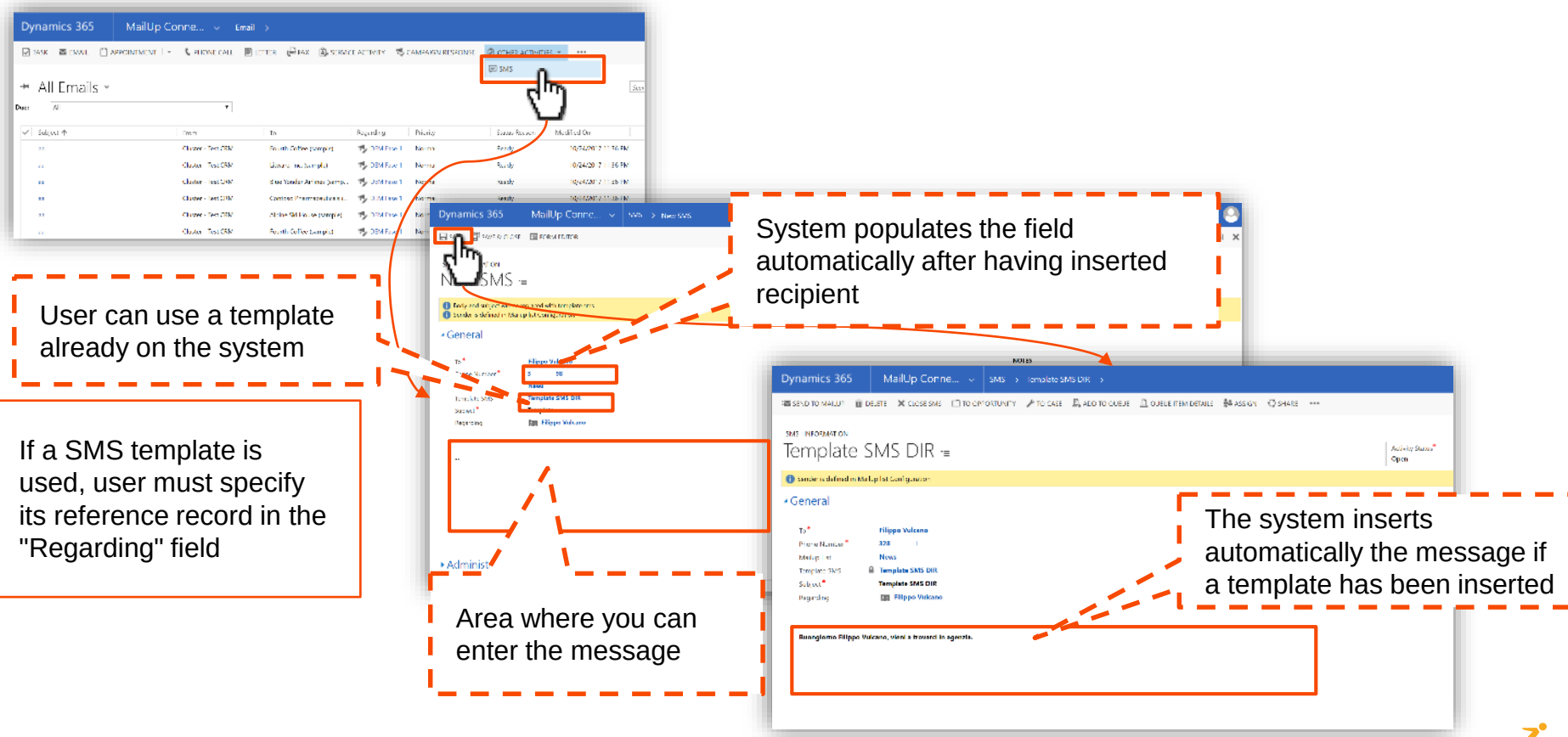
Related MailUp statistics are also present within the related contact

SMS VIEW



Search, filter, and display selection features described in slide 20 are available

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

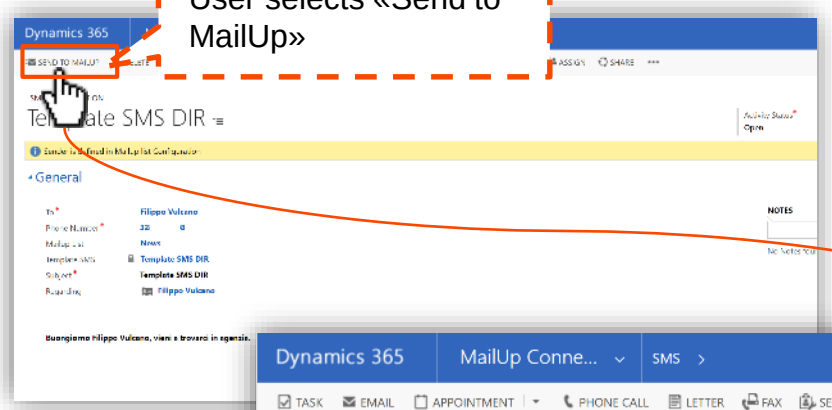
System populates the field automatically after having inserted recipient

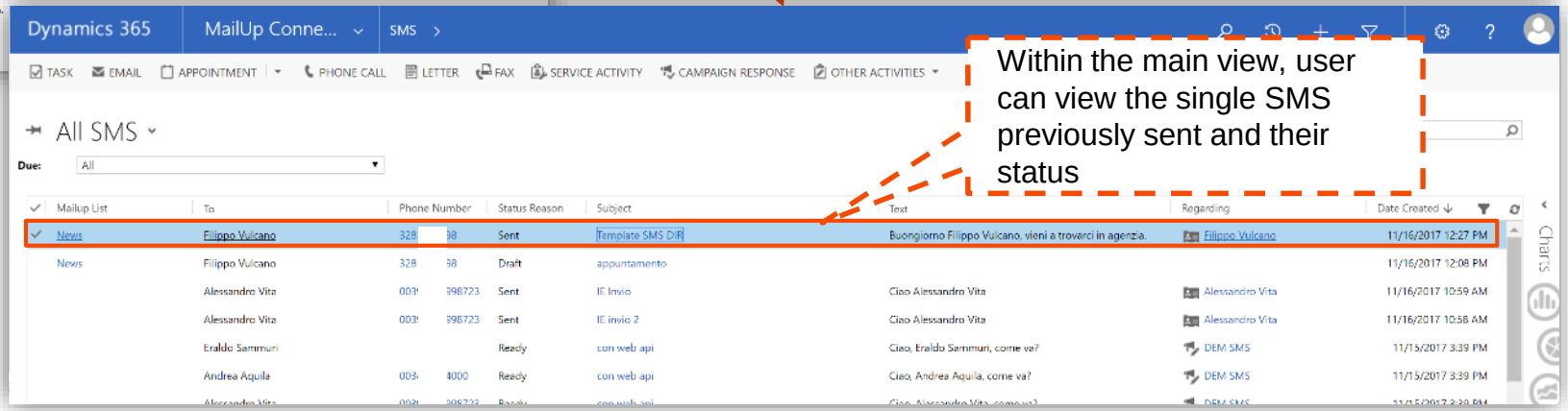
Area where you can enter the message

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

INVIO SMS

User selects «Send to MailUp»



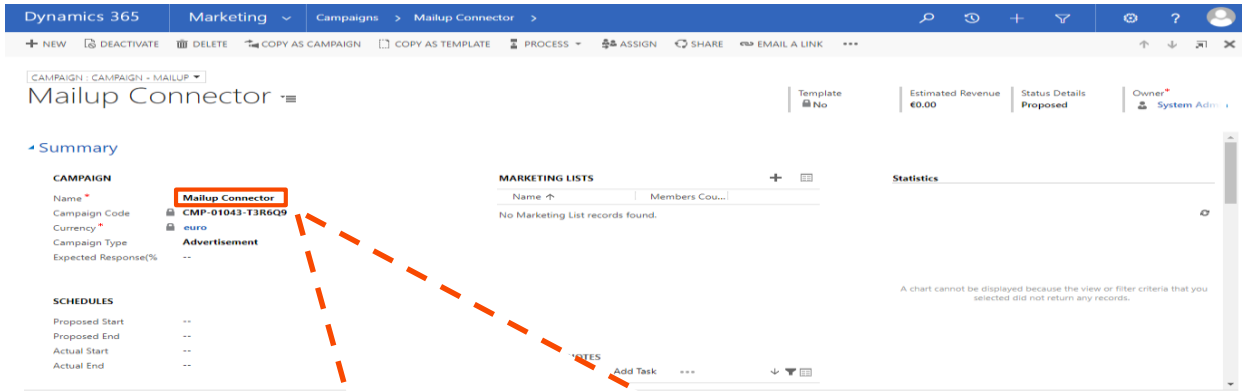


Within the main view, user can view the single SMS previously sent and their status

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.



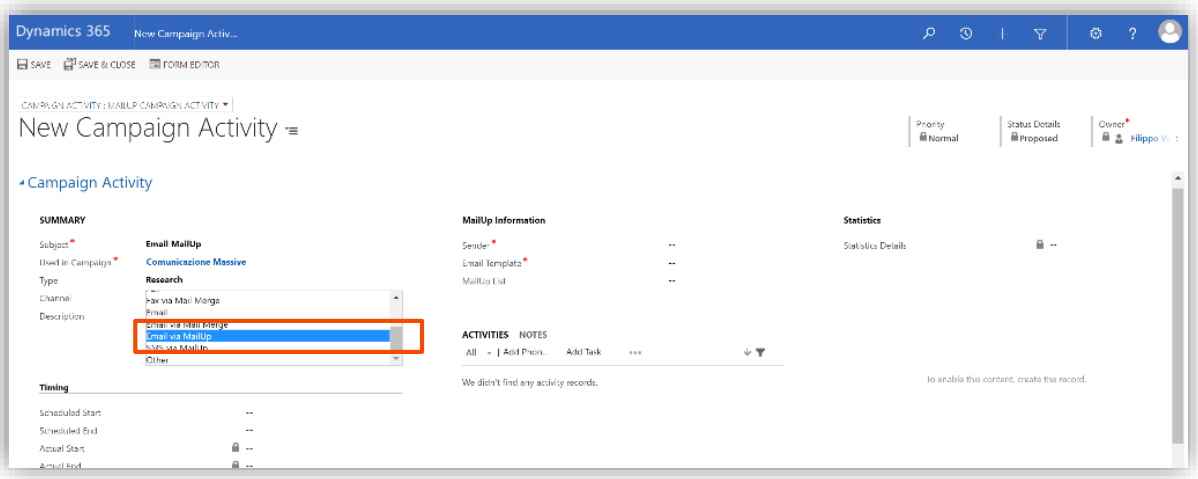
Sending of Emails and SMS associated with campaigns is only provided with the PRO version of the connector

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

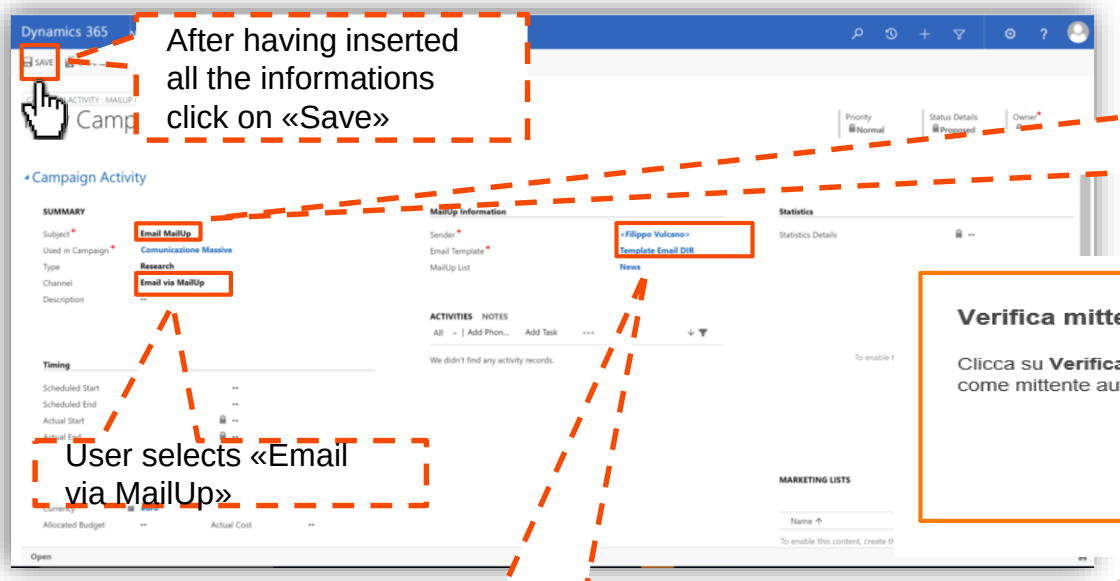
CAMPAIGN ACTIVITY

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



MAILUP EMAIL



After having inserted all the informations click on «Save»

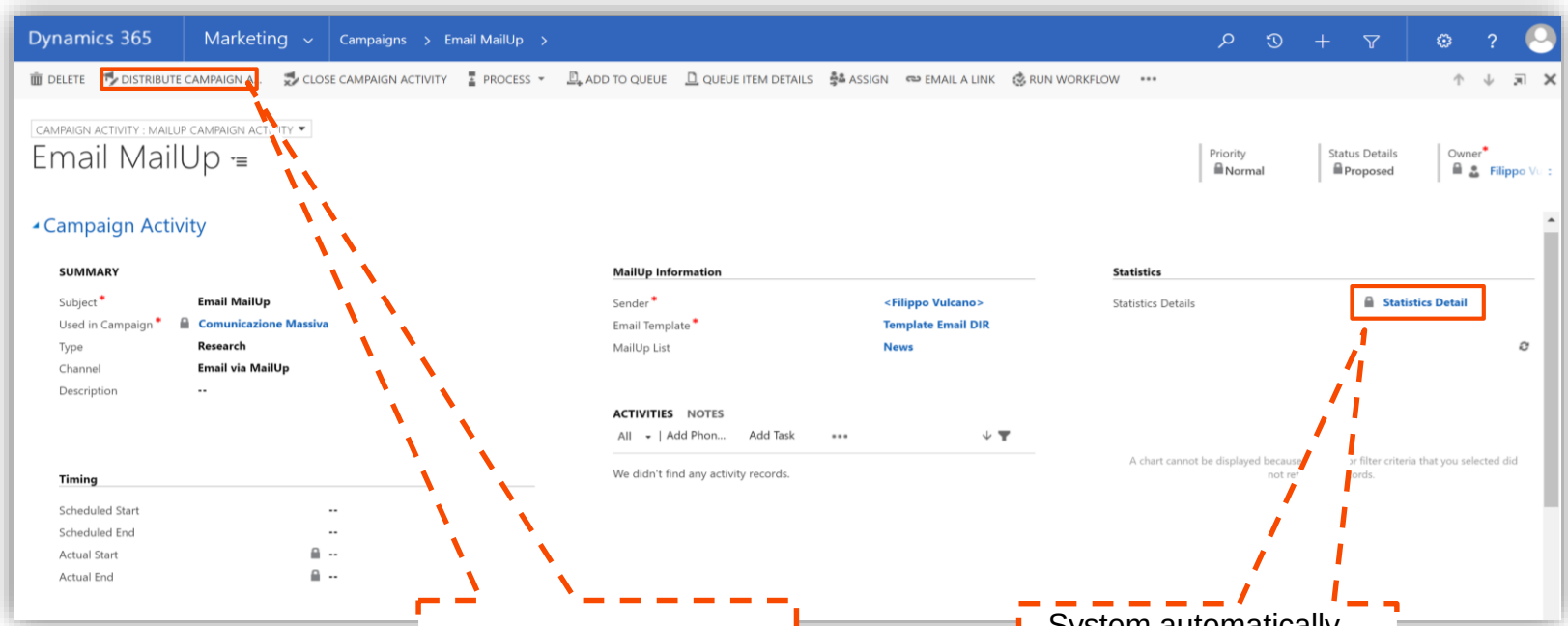
The subject of a campaign ACTIVITY can contain a maximum of 10 characters.

User selects «Email via MailUp»

User inserts sender and template to use

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.

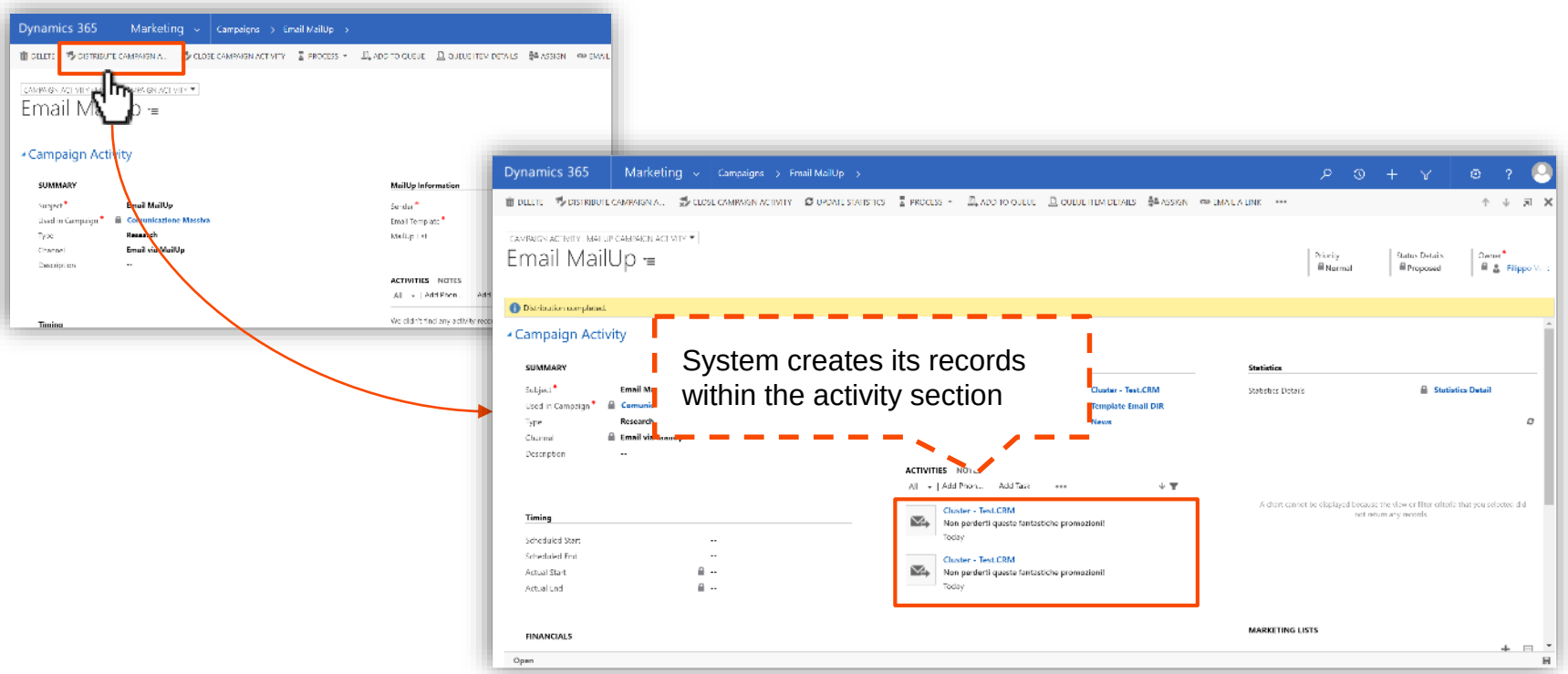
MAILUP EMAIL



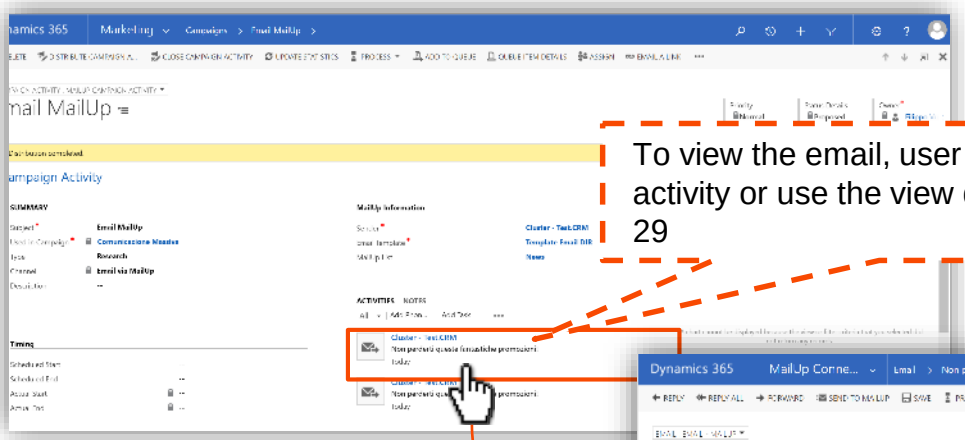
User can distribute tasks

System automatically populates the «statistics Details» field

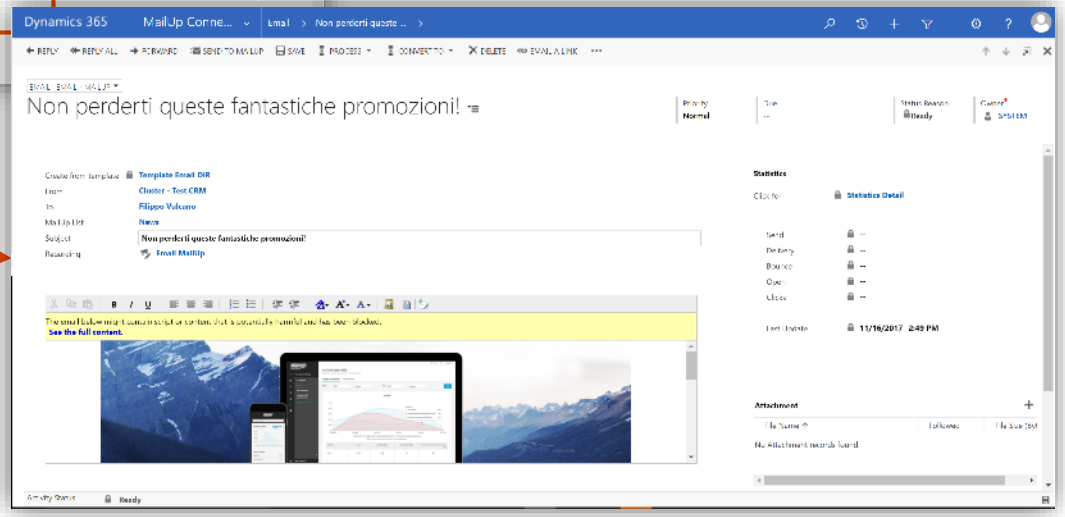
ACTIVITY VIEW



EMAIL VIEW

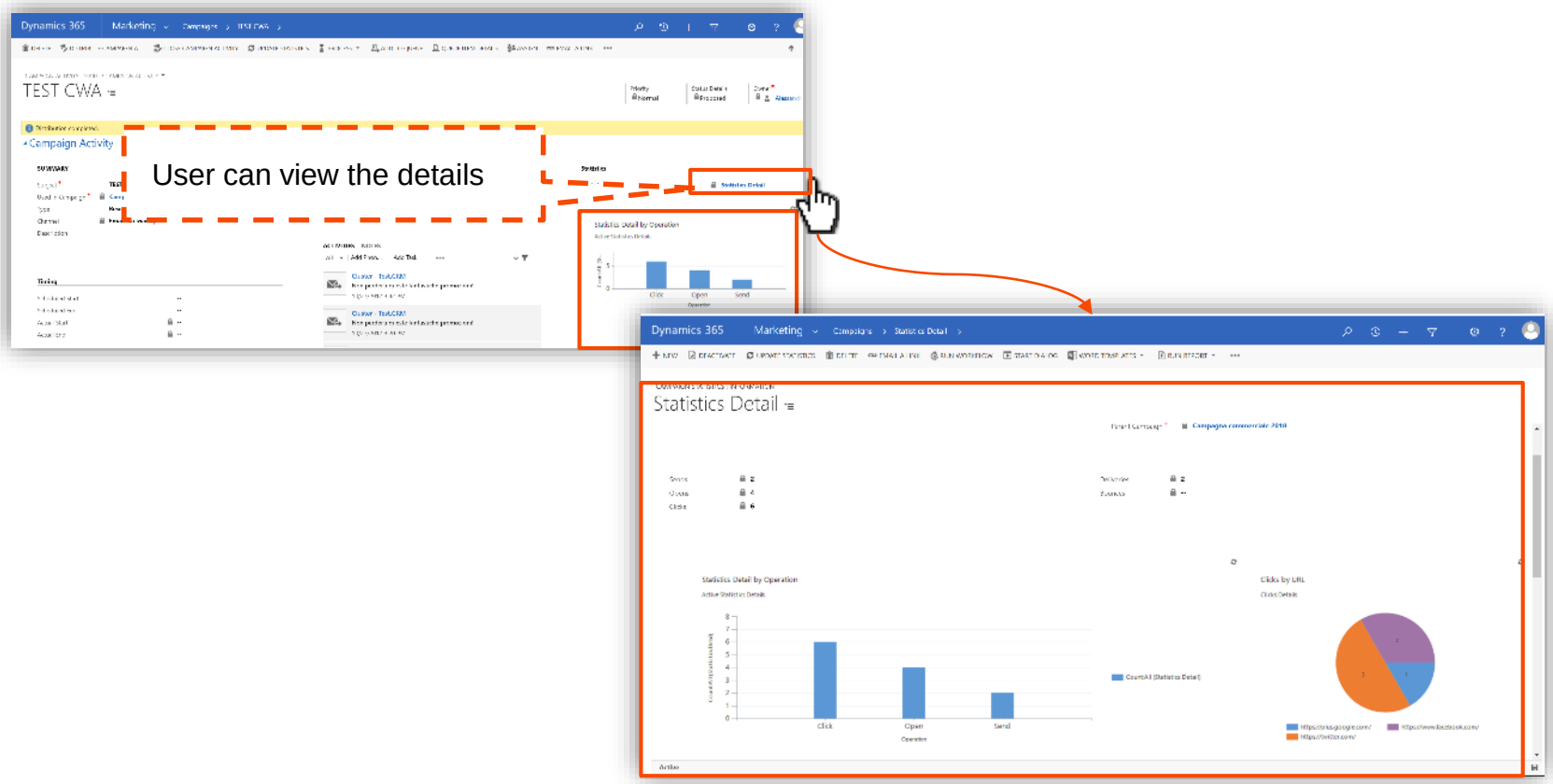


To view the email, user can open the activity or use the view described in slide 29

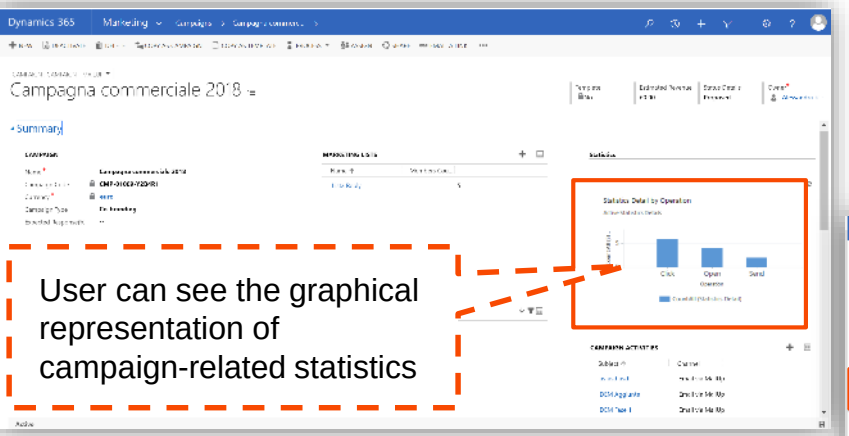


In the Light version, you can not send emails associated with campaigns; This feature is available with PRO version of the connector.

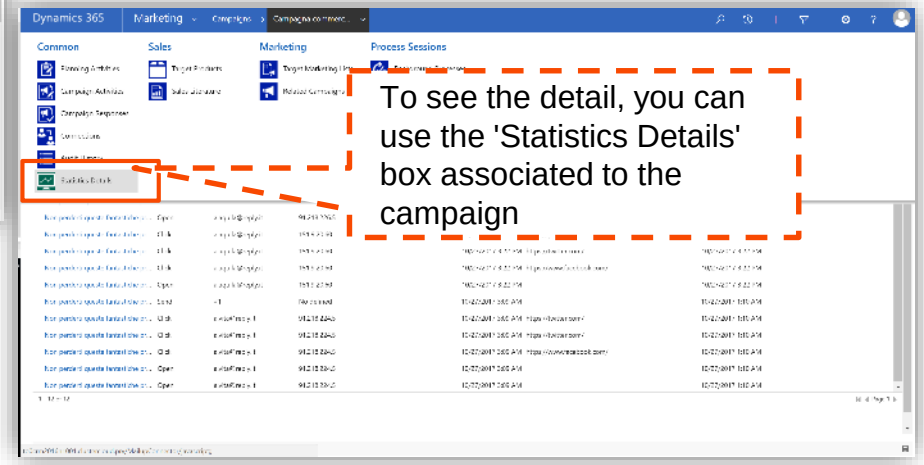
CAMPAIGN ACTIVITY STATISTICS



CAMPAIGN STATISTICS



User can see the graphical representation of campaign-related statistics

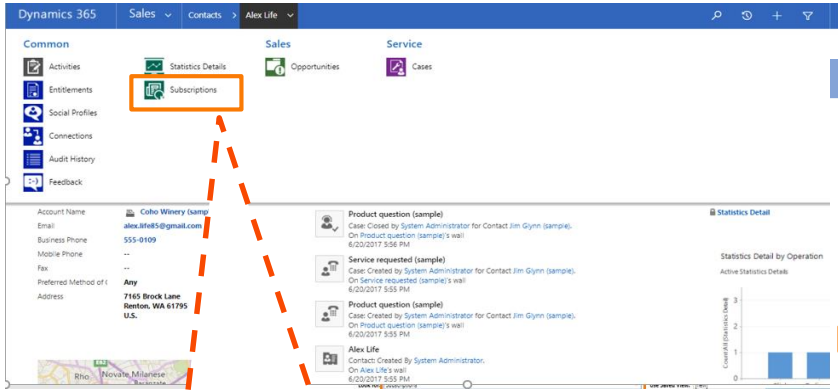


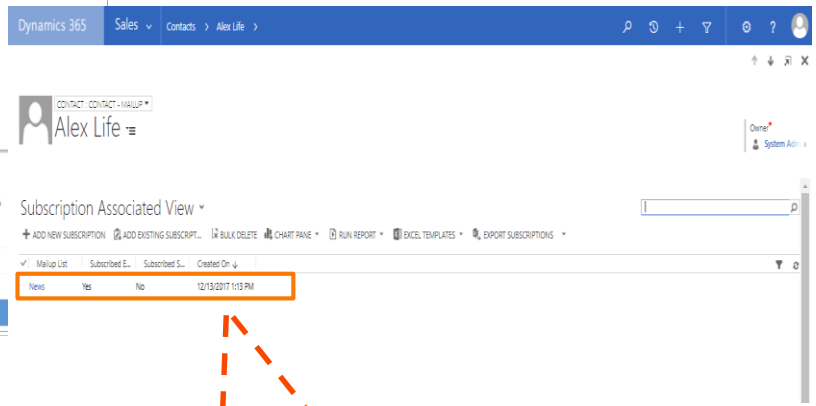
To see the detail, you can use the 'Statistics Details' box associated to the campaign

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



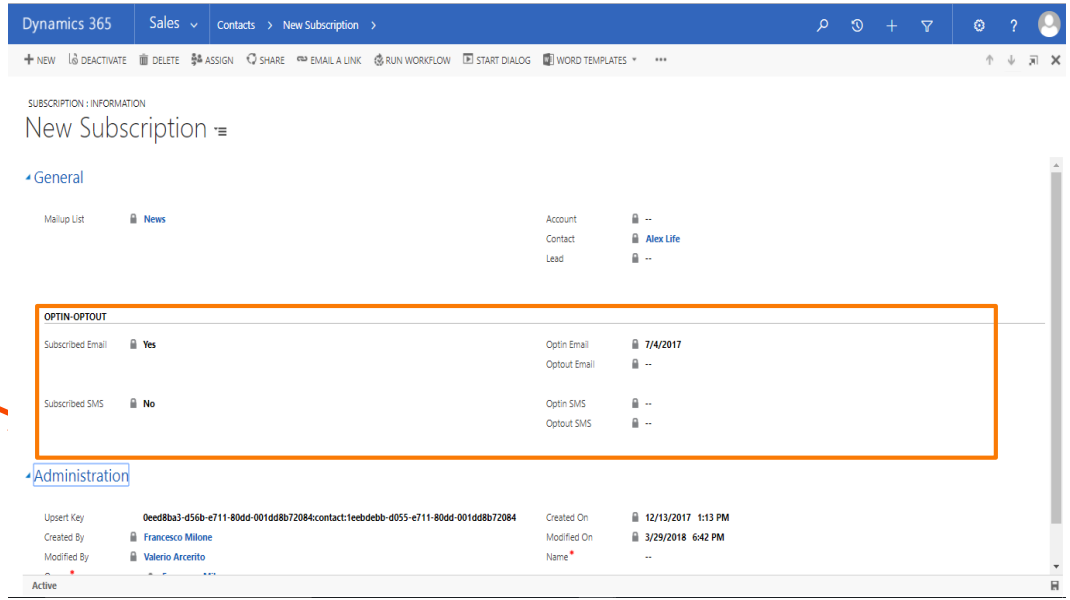


To view the subscription details, the user selects the «Subscriptions» box associated with the Accounts, Contact or Leads

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.



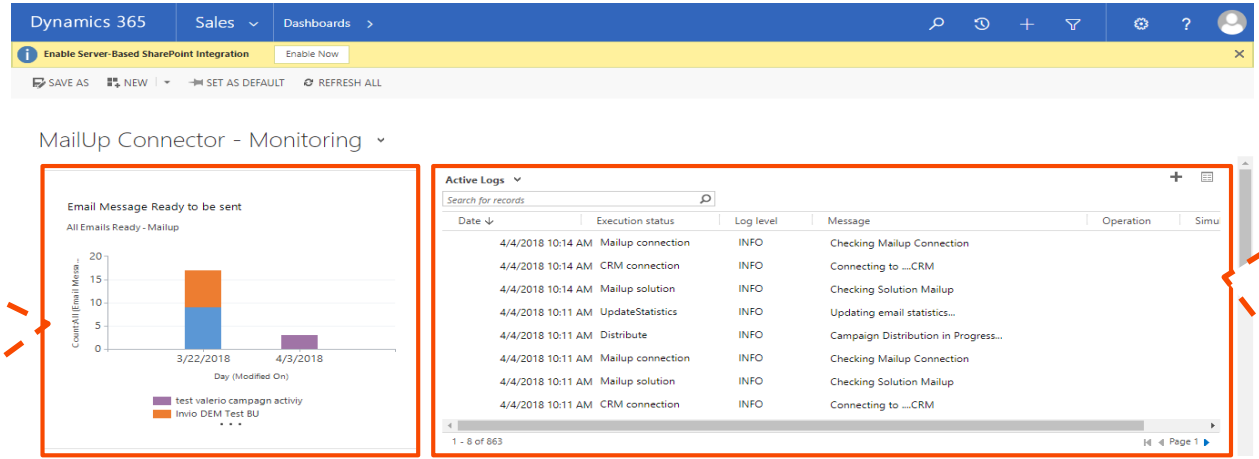
Subscriptions are updated daily

DASHBOARDS

DASHBOARDS

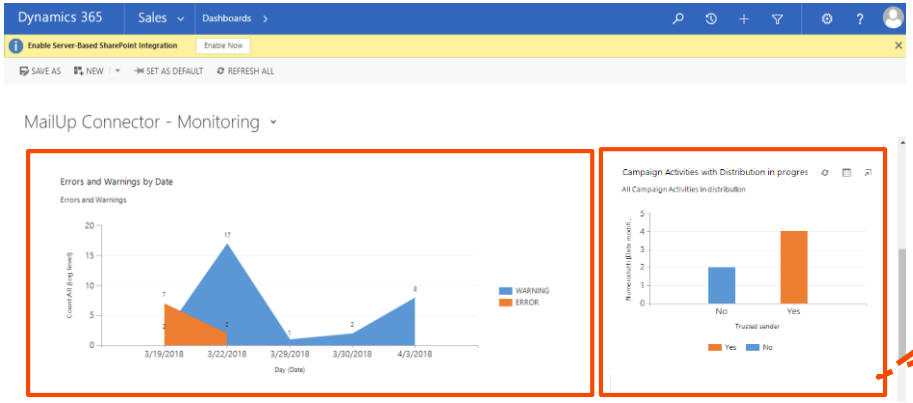
User displays the Mailup Connector Dashboards, that show the status of some features of the Mailup connector, such as the Mail ready to be sent(in Ready state), the Active Logs, the number of errors sorted by date, active campaigns with distribution in progress, and the number of simultaneous operations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

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



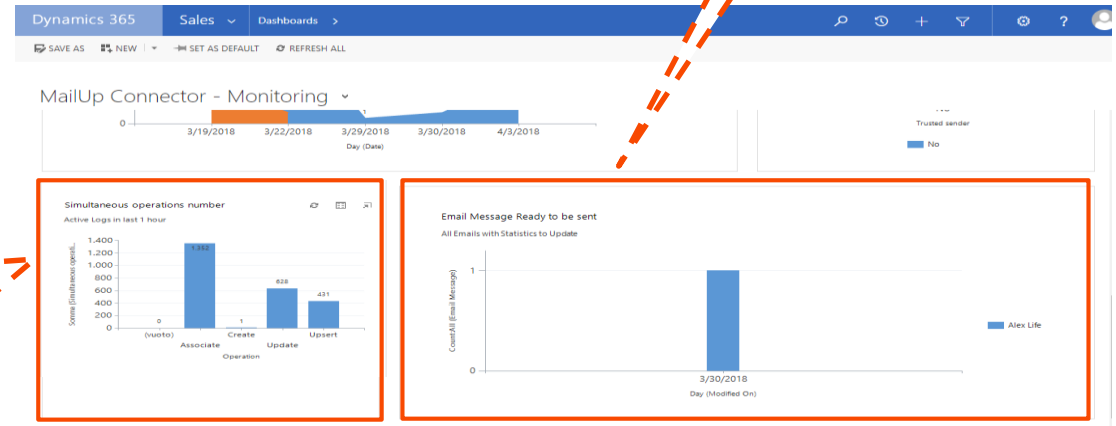
User displays the active logs view

DASHBOARDS



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