

# **DYNAMICS 365 – MAILUP CONNECTOR**

# INDEX

- 1 Introduction
- 2 Navigation Path
- 3 Account/List configuration
- 4 Placeholders
- 5 Template Generation
- 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.

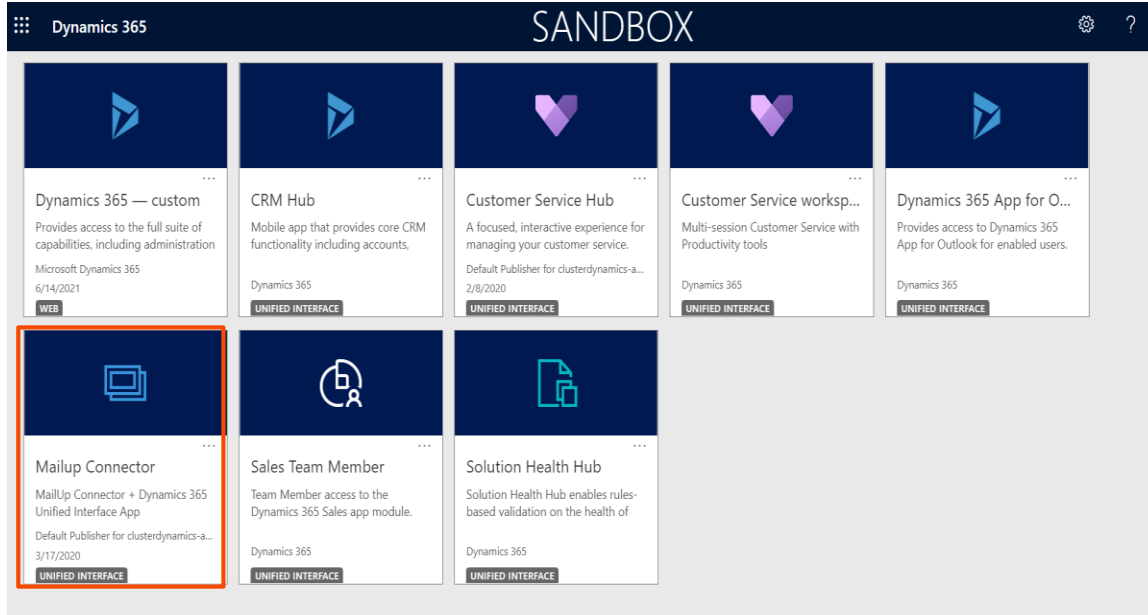


# NAVIGATION PATH



# MAILUP CONNECTOR

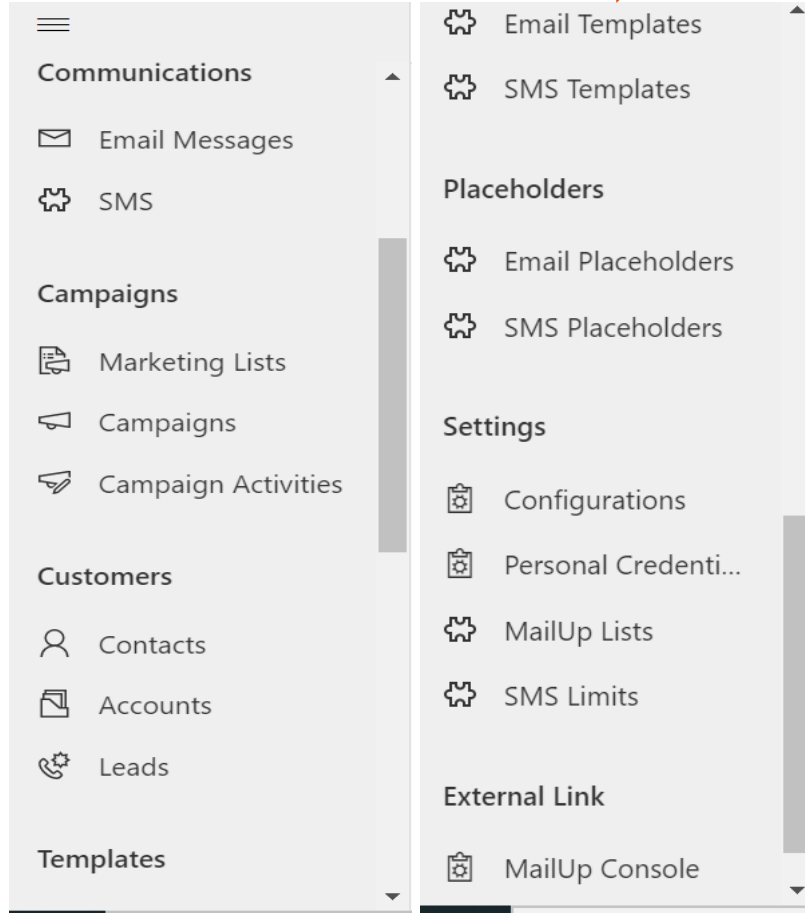
The user, once logged in in to the system (through its credentials), uses the following navigation path in order to view **MailUp** functionalities.



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



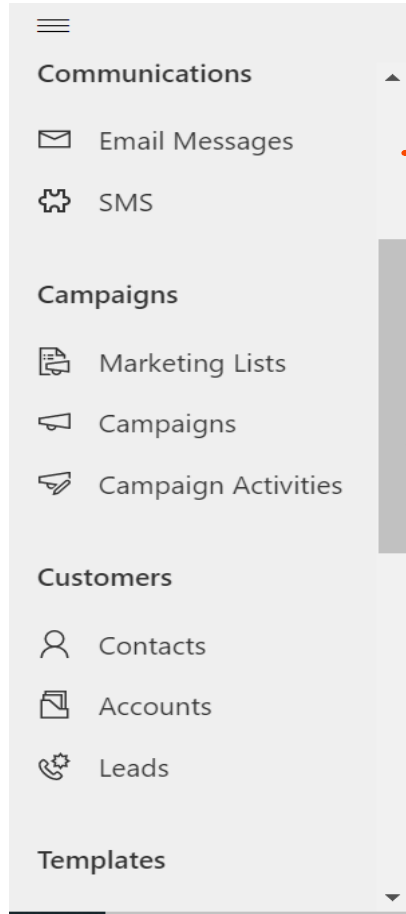
# COMPONENTS



These are the components displayed in this section

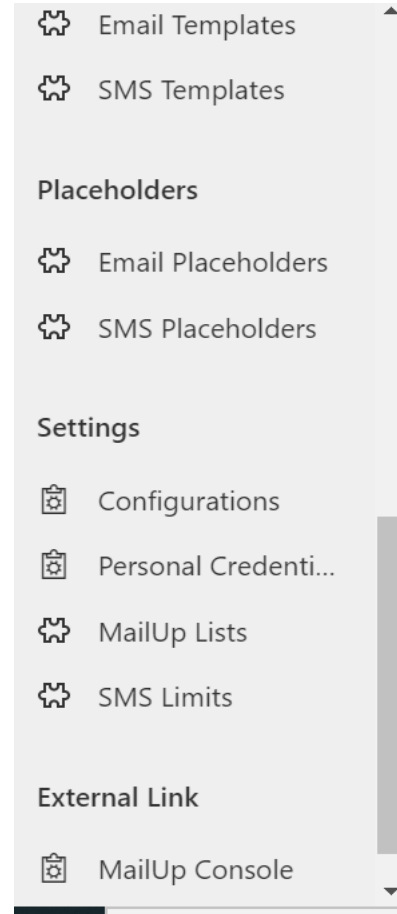


# MAILUP CONNECTOR SECTIONS



Communication area

Campaigns creation



Template  
Creation area

Definition of dynamic  
fields

Account Configuration  
area

External Mailup link





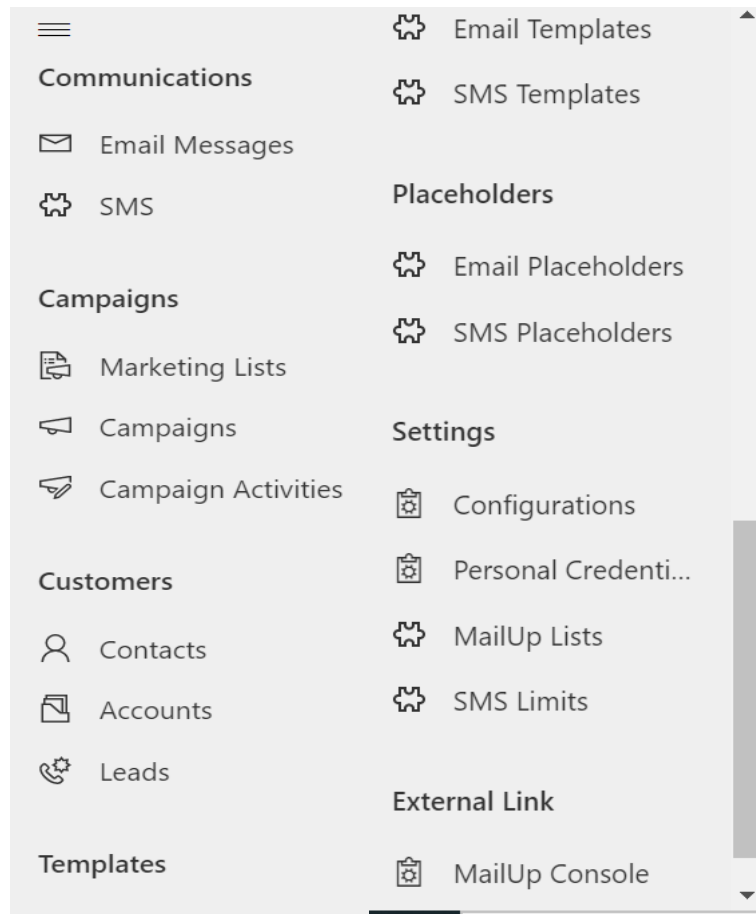
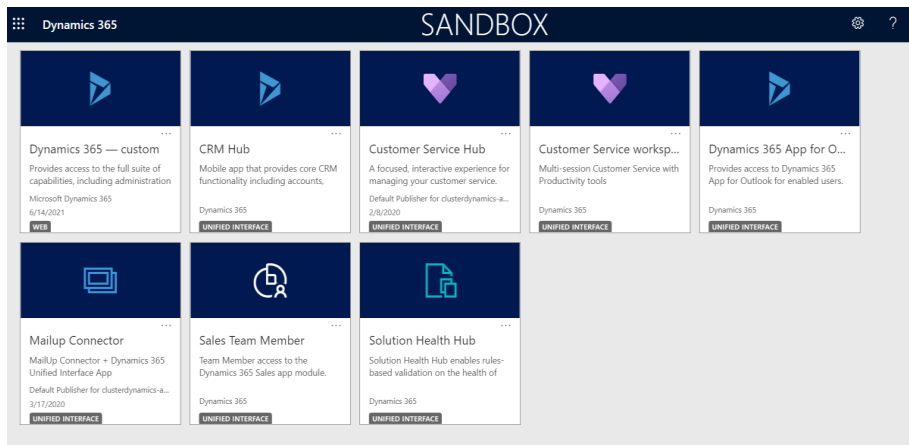
# ACCOUNT/LIST CONFIGURATION



# SETTINGS

Within the configuration section user can:

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



# ACCOUNT ADMINISTRATOR

Email Templates

SMS Templates

Placeholders

Email Placeholders

SMS Placeholders

Settings

Configurations

Personal Credentials

MailUp Lists

SMS Limits

External Link

MailUp Console

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

The user can request and associate a Mail up test version

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

MailUp Administrator Credentials

MailUp UserName

m101828

MailUp Password

Open MailUp Trial

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

Editor Email (Bee Plugin)

Template Editor Client ID

b5e8756a-fbe5-4c84-9def-c74e290f8092

Template Editor Client Secret

XejBWbIttEby8bIT824efCXzt2Q1jfN6zGGhKilGEnTOUn6ZRa3

UID

orgbb8a5c38-082cd810-aaa7-63d3-0a21-05d1c8ddb250

Open Editor Registration

Set Editor Trial Values

Create Default Placeholders

Save All

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

- ☰
- Communications
  - ✉ Email Messages
  - ✉ SMS
- Campaigns
  - 📄 Marketing Lists
  - 📺 Campaigns
  - 📺 Campaign Activities

- Customers
  - 👤 Contacts
  - 📄 Accounts
  - ⚙ Leads

Templates

🔧 Email Templates

🔧 SMS Templates

Placeholders

🔧 Email Placeholders

🔧 SMS Placeholders

Settings

⚙ Configurations

⚙ Personal Credential...

🔧 MailUp Lists

🔧 SMS Limits

External Link

⚙ MailUp Console

## MailUp Personal Credentials

CRM Username

si.giordano@clusterreplyhr.onmicrosoft.com

CRM Email (Sender)

si.giordano@clusterreplyhr.onmicrosoft.com

MailUp Personal UserName

m000001

MailUp Personal Password

\*\*\*\*\*

Save

Email address  
associated to the  
account

If user has already its credentials  
he can insert them in order to  
access MailUp

After having saved the  
information, system will  
send a verification email to  
the specified address



# VIEW MAILUP LISTS

The screenshot shows the left navigation pane of the Dynamics 365 interface. The 'MailUp Lists' option is highlighted with a red box and a hand cursor. The navigation pane is organized into several sections: Communications, Campaigns, Customers, and Templates. The 'MailUp Lists' option is located under the 'Settings' section.

- Communications
  - Email Messages
  - SMS
- Campaigns
  - Marketing Lists
  - Campaigns
  - Campaign Activities
- Customers
  - Contacts
  - Accounts
  - Leads
- Templates

Settings

- Configurations
- Personal Credential...
- MailUp Lists**
- SMS Limits

The screenshot shows the 'Active MailUp Lists' table. The 'Sync From MailUp' button is highlighted with a red box. The table contains three rows of data.

Name	List Id	Created On
News	1	2/20/2020 11:25 AM
Lista per prove	2	2/20/2020 11:25 AM
GRM - Test Sys	3	2/20/2020 11:25 AM

The screenshot shows the table header of the Dynamics 365 interface, displaying columns A through Z. The first column is labeled 'All'.

All	#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
-----	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---

User clicks on the button in order to synchronize MailUp lists in Dynamics 365

All associated lists

The synchronization list is automatic only for "Pro" version



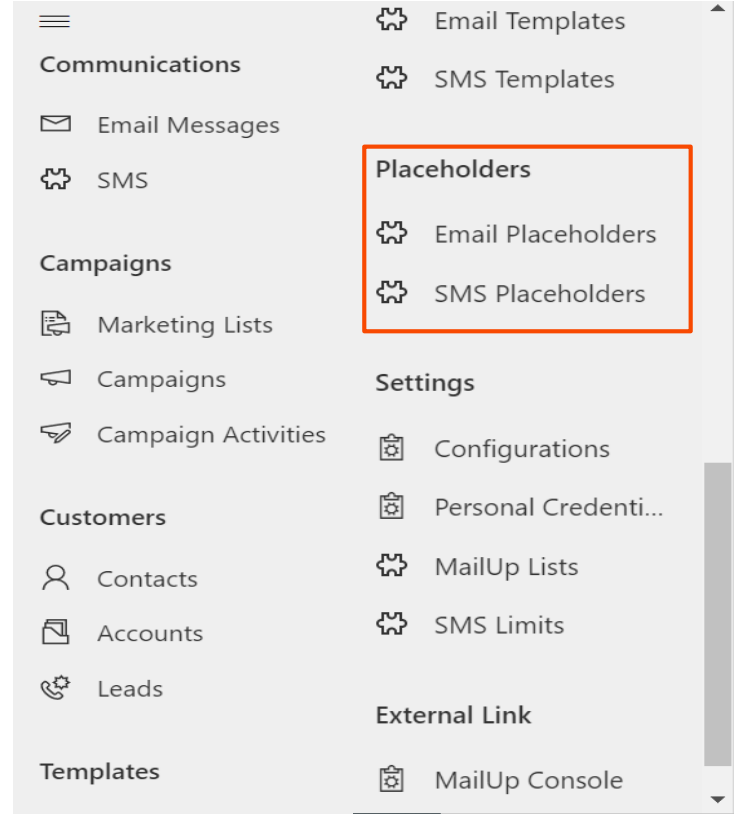
# PLACEHOLDERS



# 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

The left sidebar menu contains the following sections and items:

- Communications
  - Email Messages
  - SMS
- Campaigns
  - Marketing Lists
  - Campaigns
  - Campaign Activities
- Customers
  - Contacts
  - Accounts
  - Leads
- Templates
  - MailUp Console

Below the main menu, there are two additional sections:

- Placeholders
  - Email Placeholders** (highlighted with a red box and a hand cursor icon)
  - SMS Placeholder
- Settings
  - Configurations
  - Personal Credential...
  - MailUp Lists
  - SMS Limits
- External Link

User clicks on  
Email Placeholders

System allows to select the reference view

Search this view

Name	Tag	Regarding Entity	Created On
test 2 fax	{{contact.fax}}	Contact	5/10/2021 3:44 PM
campo di prova	{{contact.logicalnameoffield}}	Contact	2/26/2021 10:27 AM
test1	{{contact.logicalnameoffield}}	Contact	2/20/2020 2:53 PM
Address City	{{contact.address1_city}}	Contact	2/20/2020 10:59 AM
Address Name	{{contact.address1_name}}	Contact	2/20/2020 10:59 AM
BirthDate	{{contact.birthdate}}	Contact	2/20/2020 10:59 AM
Company	{{contact.company}}	Contact	2/20/2020 10:59 AM
E-Mail	{{contact.emailaddress1}}	Contact	2/20/2020 10:59 AM

1 - 29 of 29 (0 selected)

Search box

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

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





# SMS PLACEHOLDER

The left sidebar menu contains the following items:

- Communications
  - Email Messages
  - SMS
- Campaigns
  - Marketing Lists
  - Campaigns
  - Campaign Activities
- Customers
  - Contacts
  - Accounts
  - Leads
- Templates
  - MailUp Console

On the right side of the sidebar, there are additional menu items:

- Email Templates
- SMS Templates
- Placeholders
  - Email Placeholders
  - SMS Placeholders** (highlighted with a red box and a hand cursor icon)
- Settings
  - Configurations
  - Personal Credential...
- MailUp Lists
- SMS Limits
- External Link
- MailUp Console

User clicks SMS Placeholders

System allows to select the reference view

Search this view

Name	Tag	Regarding Entity	Created On
prova sms placeholder	{{account.address1_city}}	Account	2/20/2020 2:54 P
MobilePhone	{{contact.mobilephone}}	Contact	2/20/2020 10:59
Telephone	{{contact.telephone1}}	Com	2/20/2020 10:59
Name	{{account.name}}		2/20/2020 10:59
Address City	{{account.address1_city}}	Jnt	2/20/2020 10:59
Address Name	{{account.address1_name}}	count	2/20/2020 10:59
Revenue	{{account.revenue}}	Account	2/20/2020 10:59
E-Mail	{{account.email}}	Account	2/20/2020 10:59

1 - 27 of 27 (0 selected)

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

Search box

## Advanced filters

AND

Status Equals Active

+ Add

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



# CREATING A NEW PLACEHOLDER

Active Email placeholders

Name			
test 2 fax	{{contact.logicalnameoffield}}	Contact	2/20/2020 2:53 PM
campo di prova	{{cc}}	AM	
test1	{{(contact.logicalnameoffield)}}	Contact	2/20/2020 2:53 PM
Address City	{{(contact.address1_city)}}	Contact	2/20/2020 10:59 AM
Address Name	{{(contact.address1_name)}}	Contact	2/20/2020 10:59 AM
BirthDate	{{(contact.birthdate)}}	Contact	2/20/2020
Company	{{(contact.company)}}	Contact	2/20/2020
E-Mail	{{(contact.emailaddress1)}}	Contact	2/20/2020

1 - 29 of 29 (0 selected)

Within the main view, user clicks «New»

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

## New Email Placeholder

General Administrator

Name \* Città

Regarding Entity \* Lead

Record name

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

Tag \* {{lead\_address1\_city}}

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

Regarding entity from which taking the information. User can select:

- Lead
- Account
- Contact

This characters sequence must be in the following format:

**{{RegardingEntity.Namefield}}**

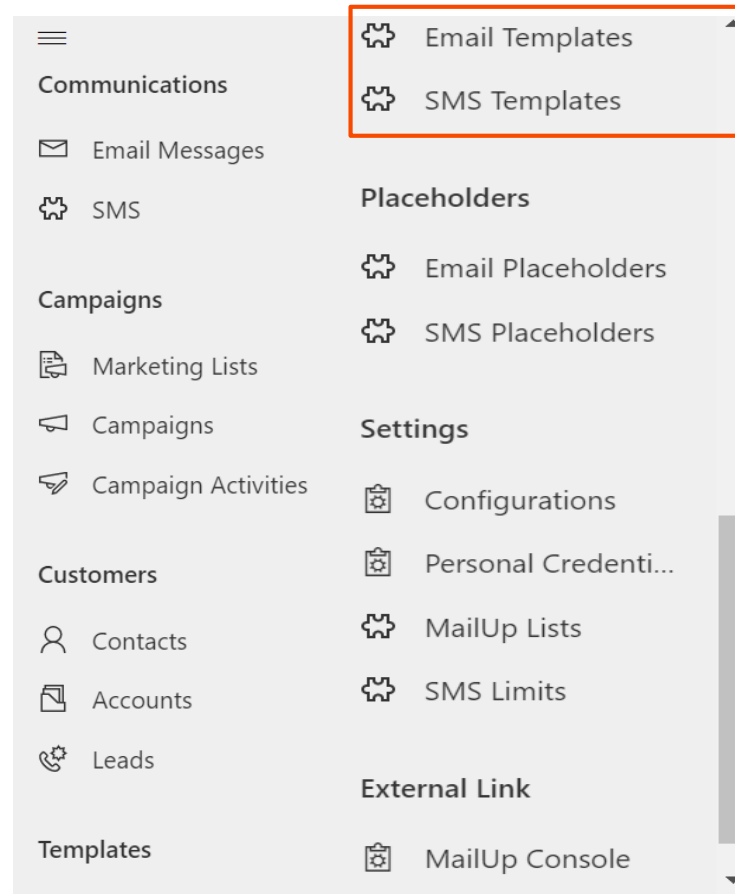


# TEMPLATE GENERATION



# 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

Left sidebar navigation menu:

- Communications
  - Email Messages
  - SMS
- Campaigns
  - Marketing Lists
  - Campaigns
  - Campaign Activities
- Customers
  - Contacts
  - Accounts
  - Leads
- Templates
  - Email Templates** (highlighted with a red box and an arrow pointing to the main content area)
  - SMS Templates
- Placeholders
  - Email Placeholders
  - SMS Placeholders
- Settings
  - Configurations
  - Personal Credentiali...
  - MailUp Lists
  - SMS Limits
- External Link
  - MailUp Console

Active Email Templates

Name	Subject	Regarding Entity	Created On
prova 08/06	Testare email placeholders	Account	6/8/2021 8:24 AM
template di prova	testare funzionalità template	Contact	5/10/2021 3:51 PM
test template nuovo bee	test	Contact	4/20/2021 12:35 PM
Cluster Reply - 2	Learn more about Cluster Reply	Contact	2/26/2021 11:09 AM
Non incolonnare su mobile	A	Contact	2/3/2021 9:38 AM
Cluster Reply	Learn more about Cluster Reply	Contact	2/1/2021 3:17 PM
test immagini	test immagini	Contact	1/7/2021 9:36 AM
SOSPENSIONE ATTIVITA' lead	SOSPENSIONE ATTIVITA' lead	Lead	5/20/2020 5:48 PM

1 - 9 of 9 (0 selected)

Search / filter features are available also in the SMS view

## Advanced filters

AND

Status

Equals

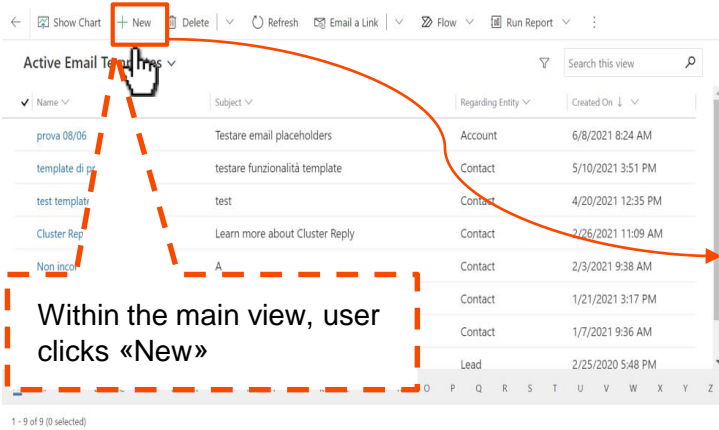
Active

+ Add

Search box

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

# CREATE EMAIL TEMPLATE



Within the main view, user clicks «New»

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

A screenshot of the 'New Email Template' form. The 'Template Name' field is highlighted with a dashed red box. The 'Name' field is highlighted with a red box and contains the text 'Template Email'. The 'Subject' field is highlighted with a red box and contains the text 'Non perderti queste fantastiche promozioni'. The 'Regarding Entity' field is highlighted with a red box and contains the text 'Contact'. A dashed red arrow points from the 'Regarding Entity' field to the list of possible values in the bottom right.

Template Name

New Email Template

General Editor Classic Editor HTML Attribution

Information

Name \* Template Email

Subject \* Non perderti queste fantastiche promozioni

Regarding Entity Contact

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

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



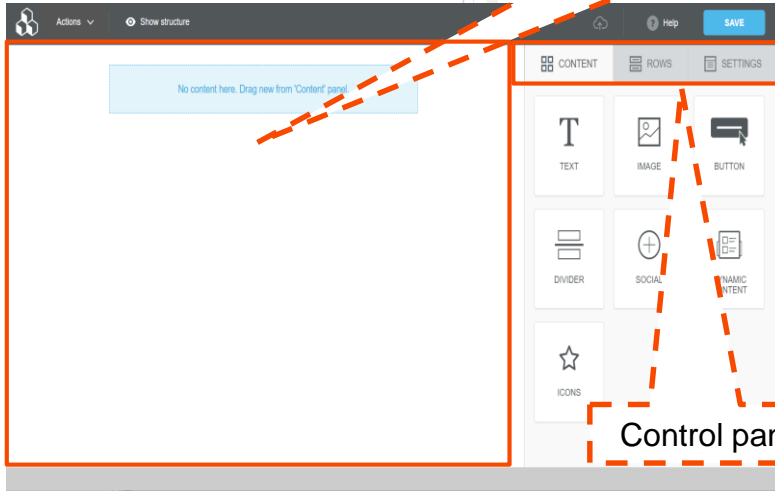
# OPEN EDITOR EMAIL

Email Templates  
Email Template

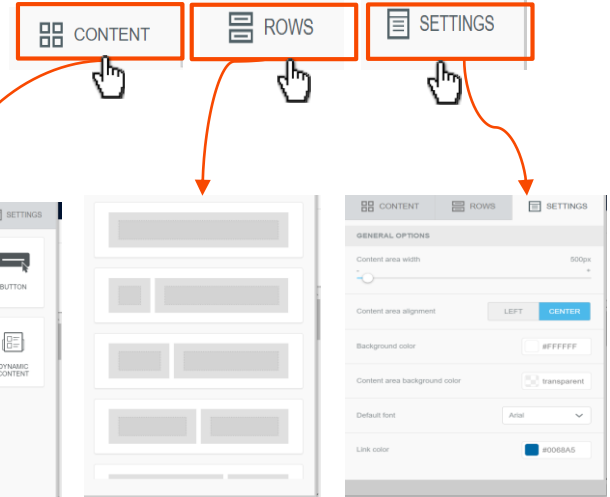
General **Editor** Classic Editor HTML Administration Related

OPEN EDITOR

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



Control panel area



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



# DRAW AND DROP EMAIL

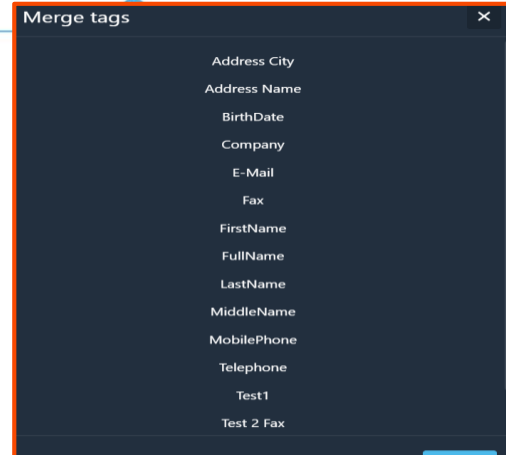


User, by dragging the different elements from the control panel, can set:

- the content
- structure

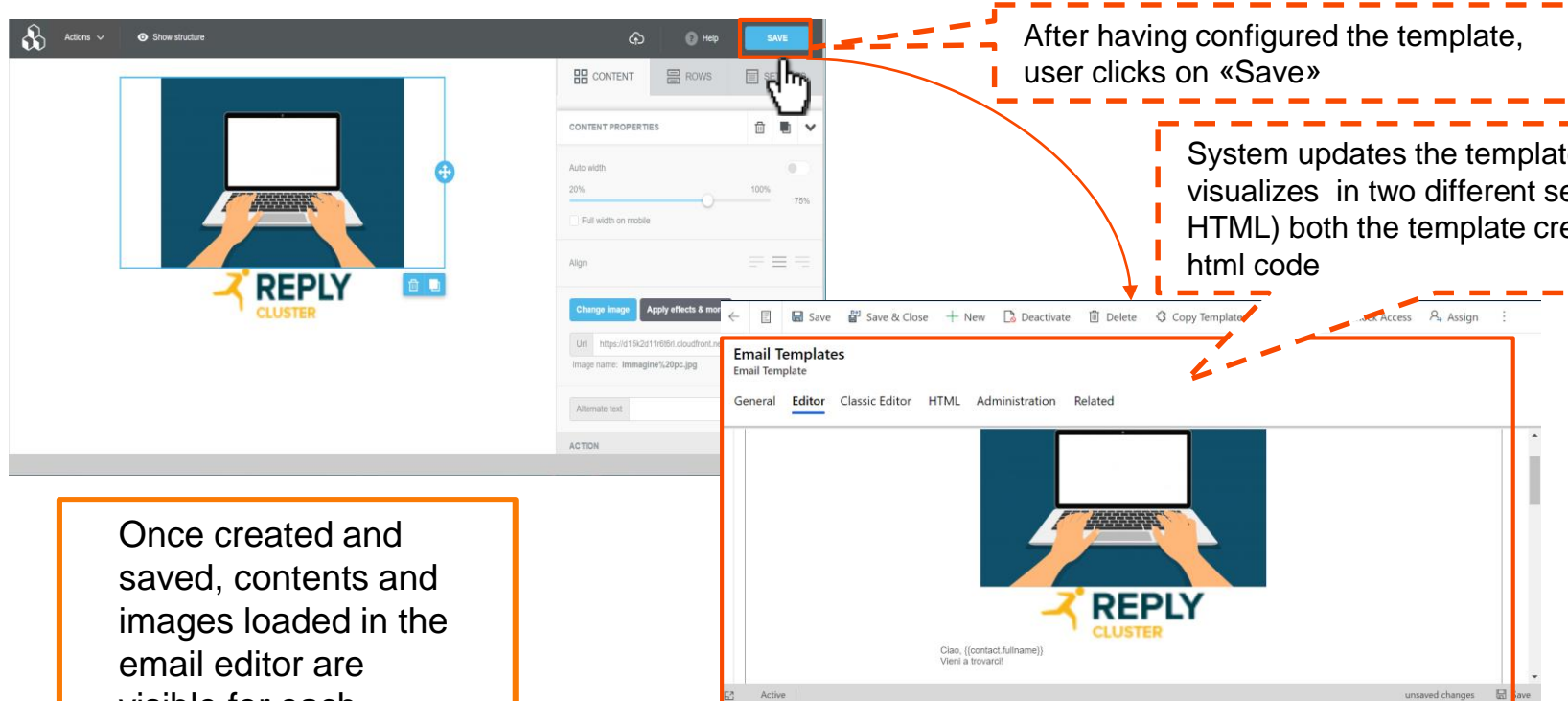
In order to specify a dynamic field, it must be present in the Placeholder section and the related entity must be selected during the creation

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





# VIEW TEMPLATE EMAIL



The image shows a two-part interface for creating and viewing email templates. The top part is the editor, and the bottom part is the preview view.

**Editor Interface:**

- Top Bar:** Includes 'Actions', 'Show structure', and a 'SAVE' button highlighted with a red dashed box and an arrow pointing to the preview view.
- Main Canvas:** Displays a template with a laptop image and the 'REPLY CLUSTER' logo.
- Properties Panel:** On the right, it shows 'CONTENT' and 'ROWS' tabs, and 'CONTENT PROPERTIES' with settings for 'Auto width' (20% to 100%) and 'Full width on mobile'.
- Bottom Bar:** Contains buttons for 'Change image', 'Apply effects & more', 'Save', 'Save & Close', 'New', 'Deactivate', 'Delete', and 'Copy Template'.

**Preview View (Email Templates):**

- Header:** 'Email Templates' and 'Email Template'.
- Tabs:** 'General', 'Editor' (active), 'Classic Editor', 'HTML', 'Administration', and 'Related'.
- Content:** A preview of the email template, showing the laptop image and the 'REPLY CLUSTER' logo. Below the logo, there is a placeholder for a name: 'Ciao, {{contact.fullname}}' and a line of text: 'Vieni a trovarci!'.
- Footer:** Shows 'Active' and 'unsaved changes' with a 'save' button.

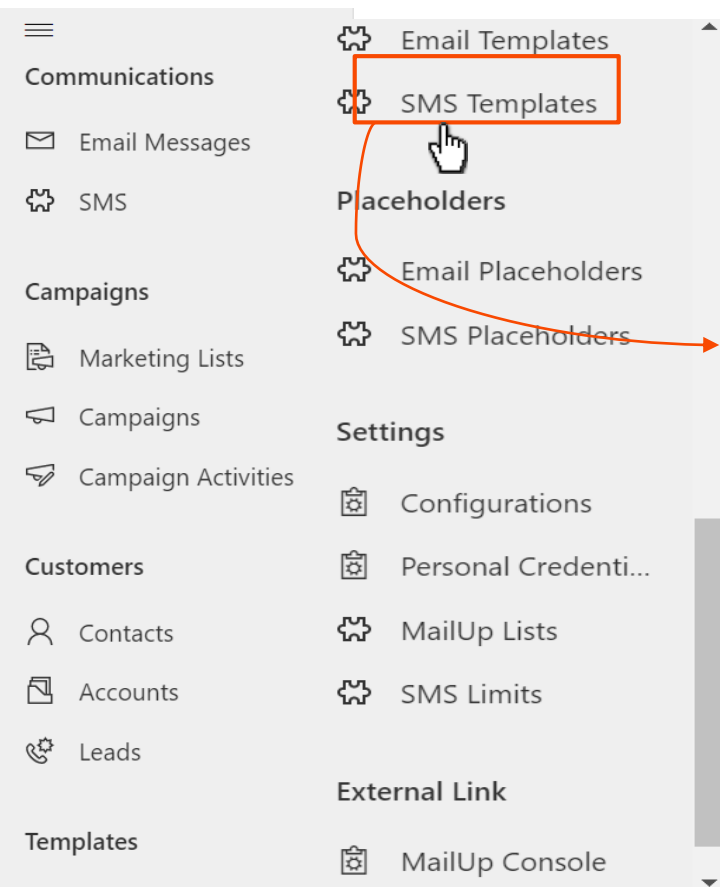
**Annotations:**

- A red dashed box around the 'SAVE' button in the editor, with an arrow pointing to the preview view, accompanied by the text: "After having configured the template, user clicks on «Save»".
- A red dashed box around the preview view, with an arrow pointing to it from the editor, accompanied by the text: "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



Communications

- Email Messages
- SMS

Campaigns

- Marketing Lists
- Campaigns
- Campaign Activities

Customers

- Contacts
- Accounts
- Leads

Templates

- Email Templates
- SMS Templates**

Placeholders

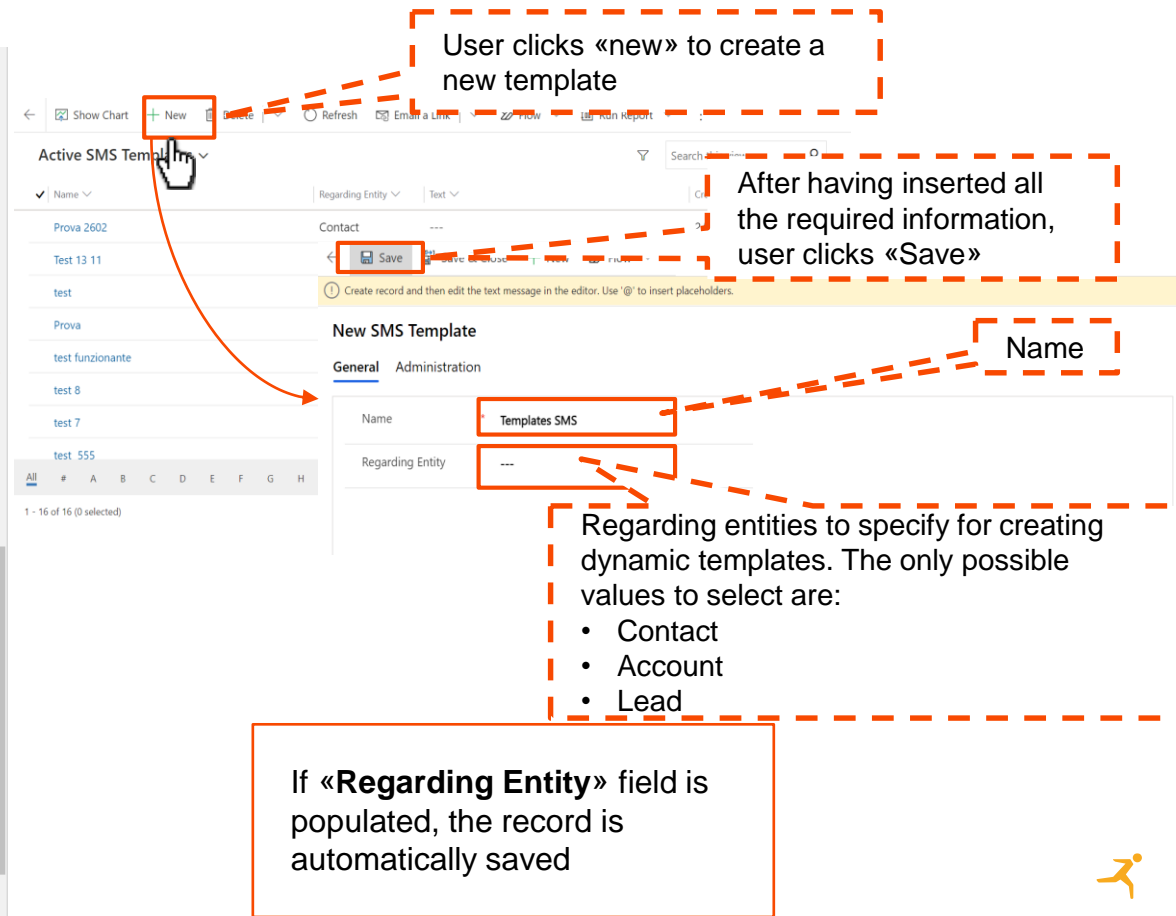
- Email Placeholders
- SMS Placeholders

Settings

- Configurations
- Personal Credential...
- MailUp Lists
- SMS Limits

External Link

- MailUp Console



User clicks «new» to create a new template

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

Name

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

The screenshot shows the 'New SMS Template' form. At the top, a yellow instruction bar reads: 'Create record and then edit the text message in the editor. Use '@' to insert placeholders.' The form has tabs for 'General' (selected), 'Administration', and 'Related'. Under the 'General' tab, there are fields for 'Name' (labeled 'Templates SMS') and 'Regarding Entity' (set to 'Contact'). Below these is a large text editor area. A red box highlights the 'Save' button in the top left toolbar. A red arrow points from this button to a red box in the text editor area. Another red arrow points from this box to a red box containing a list of dynamic fields: Address City, Address Name, BirthDate, Company, E-Mail, Fax, FirstName, FullName, LastName, and MiddleName. A red dashed box surrounds this list. A red dashed box also surrounds the 'Save' button at the bottom right of the form.

Save

Save & Close + New Flow

Create record and then edit the text message in the editor. Use '@' to insert placeholders.

### New SMS Template

General Administration

Create record and then edit the text message in the editor. Use '@' to insert placeholders.

Name \* Templates SMS

Regarding Entity ---

#### Templates SMS

SMS Template

General Administration Related

Name \* Templates SMS

Regarding Entity Contact

Address City  
Address Name  
BirthDate  
Company  
E-Mail  
Fax  
FirstName  
FullName  
LastName  
MiddleName

Active

Save

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

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

User clicks on «Save» in order save the message

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



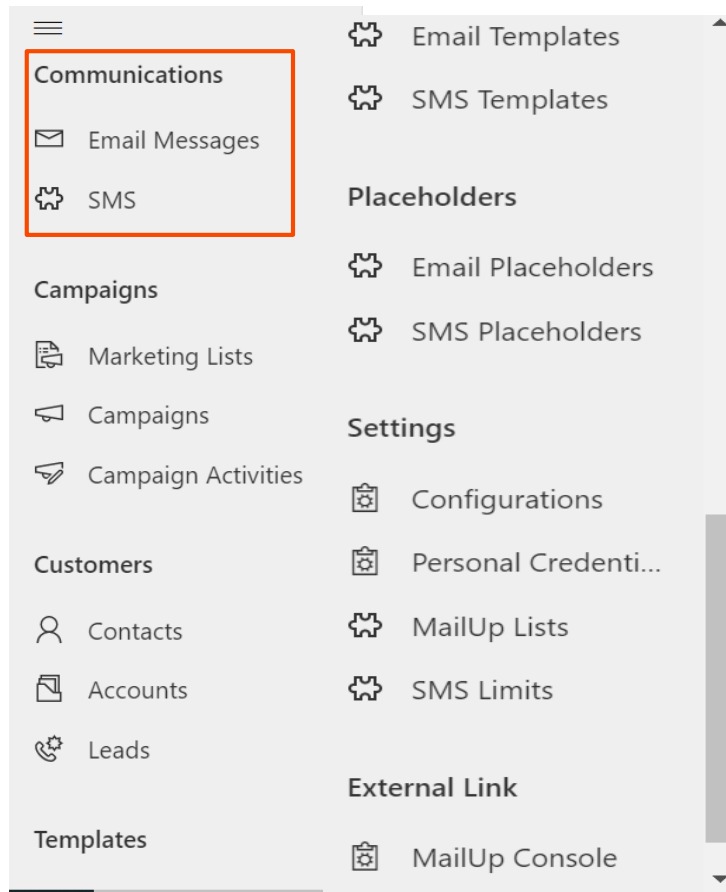
# SINGLE SENDS



# SINGLE SENDS

In communication section user can:

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



# EMAIL VIEW

Communications

- Email Messages
- SMS

Campaigns

- Marketing Lists
- Campaigns
- Campaign Activities

Customers

- Contacts
- Accounts
- Leads

Templates

- Email Templates
- SMS Templates

Placeholders

- Email Placeholders
- SMS Placeholders

Settings

- Configurations
- Personal Credentiali...
- MailUp Lists
- SMS Limits

External Link

- MailUp Console

User visualizes the sender of the communication

User visualizes the recipient of the communication

All Emails

Due: All

Subject ↑

	From	To	Regarding	Priority	Status	Reas...	Modified On
<a href="#">Learn more about Cluster Reply</a>	<Valerio Arcerito>	Antonio Personale	24032021_3	Normal	Sent		3/24/2021 3:40 ...
<a href="#">Learn more about Cluster Reply</a>	<Valerio Arcerito>	Valerio Arcerito	24032021_3	Normal	Sent		3/24/2021 3:40 ...
<a href="#">Learn more about Cluster Reply</a>	<Valerio Arcerito>	Antonio Personale	24032921_2	Normal	Sent		3/24/2021 3:00 ...
<a href="#">Learn more about Cluster Reply</a>	<Valerio Arcerito>	Valerio Arcerito	24032921_2	Normal	Sent		3/24/2021 3:00 ...
<a href="#">Learn more about Cluster Reply</a>	<Antonio Dispoto>	Antonio Dispoto	campact-2602	Normal	Sent		2/26/2021 11:01...

Navigation: All, #, A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z



# CREATE NEW EMAIL

**User clicks on Email**

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

**User selects the template to use**

**Contact, Account, Lead**

The screenshot shows a CRM interface with a sidebar on the left containing sections: Communications, Campaigns, Customers, and Templates. Under Communications, 'Email Messages' is highlighted with a red box and a hand icon. A red arrow points from this box to the 'Email' option in a dropdown menu. Another red arrow points from the 'Email' option to the 'Create from template' dropdown in the 'New Email' form. A third red arrow points from the 'Regarding' dropdown in the form to the 'Contact, Account, Lead' text. The 'New Email' form includes fields for From (Simone Giordano), To, MailUp List, Subject, and Regarding. The 'Regarding' field is highlighted with a red box. The sidebar also lists 'Email Templates' and 'SMS Templates' under Communications, and 'Contacts', 'Accounts', and 'Leads' under Customers.

# TEMPLATE ASSOCIATION

The screenshot displays an email creation interface. At the top, a 'Save' button is highlighted with a red box. A red dashed line points from this button to a text box. Below the button, a yellow notification bar states: 'Body and subject will be replaced with template email'. The left sidebar shows the 'New Email' form with fields for 'From' (Simone Giordano), 'To' (Cluster Reply srl), 'MailUp List' (News), 'Subject' (---), and 'Regarding' (Simone Giordano). The main area shows a preview of the email content, which includes a laptop illustration and the 'REPLY CLUSTER' logo. A red dashed line points from the 'Save' button to the preview area.

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

System automatically inserts the template populating dynamic fields





# EMAIL SEND

All Emails ▾

Due  
All ▾

✓ Subject ↑ ▾	From ▾	To ▾	Regarding ▾	Priority ▾	son ▾	Modified On ▾
---	<Antonio Dispoto>	Antonio Personale	---	Normal		5/6/2020 12:15 PM
---	Antonio Dispoto	Antonio Personale	---	Normal		5/6/2020 1:05 PM
A	Simone Giordano	Simone Giordano	<a href="#">Prova ricezione e</a>	Normal	dy	5/11/2021 4:25 PM
dd CRM:0140003	Valerio Arcerito	Antonio Personale	---	Normal	Pending Send	5/6/2020 12:20 PM
FW: Non perderti questa fantastica occasi	Simone Giordano	Simone Giordano	---	Normal	Pending Send	6/17/2021 3:04 PM
<a href="#">Learn more about Cluster Reply</a>	<Valerio Arcerito>	Antonio Personale	10052021_1	Normal	Sent	5/10/2021 10:35 AM
<a href="#">Learn more about Cluster Reply</a>	<Valerio Arcerito>	Valerio Arcerito	10052021_1	Normal	Sent	5/10/2021 10:35 AM
<a href="#">Learn more about Cluster Reply</a>	<Valerio Arcerito>	Simone Giordano	<a href="#">attività 11/05</a>	Normal	Sent	5/11/2021 4:16 PM

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



# EMAIL SEND

← Show Chart Task Email Appointment Phone Call Letter Fax Service Activity Campaign Resp

All Emails ▾

Due  
All ▾

✓ Subject ↑ ▾

	From ▾	To ▾	Regarding ▾	Priority ▾	Status Reas... ▾	Modifi...
dd CRM:0140003	Valerio Arcerito	Antonio Personale	---	Normal	Pending S...	5/6/2020 12:20 ...
FW: Non perderti questa fantastica occa	Simone Giordano	Simone Giordano	---	Normal	Pending S...	6/17/2021 3:04 ...
Learn more about Cluster Reply	<Valerio Arcerito>	Antonio Personale	10052021_1	Normal	Sent	5/10/2021 10:25
Learn more about Cluster Reply	<Valerio Arcerito>	Valerio Arcerito	10052021_1	Normal		
Learn more about Cluster Reply	<Valerio Arcerito>	Simone Giordano	attività 11/05	Normal		
Learn more about Cluster Reply	Simone Giordano	Simone Giordano	Attività 2 del 1	Normal		

1 - 50 of 116 (0 selected)

FW: Non perderti questa fantastica occasione CRM:0308003

Email · Email - MailUp ▾

Normal Priority --- Due Pending Send Status Reason Simone Giordano Owner ▾

Email Related

Create from template ---

From ○ [Simone Giordano](#)

To [Simone Giordano](#)

MailUp List [News](#)

Subject FW: Non perderti questa fantastica occasione CRM:0308003

Regarding ---

Completed

Statistics  
Click for  
---

Attachment  
No data available

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

# MAILUP EMAIL STATISTICS

All Emails ▾

Due  
All ▾

Subject	From ▾	To ▾	Regarding ▾	Priority ▾	Status Reason ▾	Modified On ▾
testare funzionalità template	Simone Giordano	Simone Giordano	email schedulata	Normal	Sent	5/14/2021 9:49 AM
Learn more about Cluster Reply	<Valerio Arcerito>	Valerio Arcerito	13052021_1	Normal	Sent	5/13/2021 3:38 PM
Learn more about Cluster Reply	<Valerio Arcerito>	Valerio Arcerito	13052021	Normal	Sent	5/13/2021 3:37 PM
testare funzionalità template	Simone Giordano	Simone Giordano	Templa			
testare funzionalità template	Simone Giordano	Simone Giordano	Templa			
test	Simone Giordano	Simone Giordano	test co			
This is the Dynamics 365 + MailUp Connector.	Simone Giordano	Simone Giordano	Campa			
Learn more about Cluster Reply	Simone Giordano	Simone Giordano	Attività			
A	Simone Giordano	Simone Giordano	Prova i			
Learn more about Cluster Reply	<Valerio Arcerito>	Simone Giordano	attività			

**testare funzionalità template**  
Email · Email - MailUp ▾

**Email** Related

Create from template [template di prova](#)

From [Simone Giordano](#)

To [Simone Giordano](#)

MailUp List [Lista per prove](#)

Subject **testare funzionalità template**

Regarding [email schedulata](#)

Statistics

Click for [Statistics Detail](#)

🔒 Send	1
🔒 Delivery	1
🔒 Bounce	---
🔒 Open	2
🔒 Clicks	---
🔒 Last Update	6/3/2021 11:31 PM



# STATISTICS MAILUP

testare funzionalità template

Email - Email - MailUp

Email Related

Create from template [template di prova](#)

From [Simone Giordano](#)

To [Simone Giordano](#)

MailUp List [Lista mail news](#)

Subject [Statistics Detail](#)

Regarding [General](#) [Administration](#) [Related](#)

Normal Priority Due Sent Status Reason Owner Valerio Acerito

Statistics

Click for

[Statistics Detail](#)

Send 1

Delivery 1

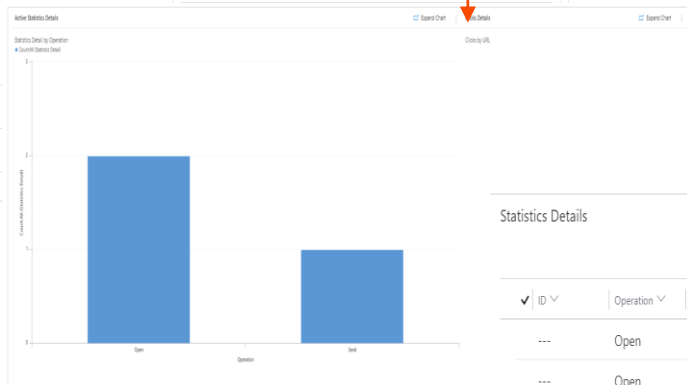
By clicking on the record the user can see the details of the statistics

Related MailUp statistics are also present within the related contact

Message [testare funzionalità template](#)

To [Simone Giordano](#)

Send	1
Open	2
Clicks	---



Statistics Details

[Add Existing Statistics ...](#) [Refresh](#)

✓ ID	Operation	Recipient	IP Address	Bounce Type	Time	URL	Created On
---	Open	simone17giordano...	66.249.81.2...	---	5/14/2021 8:14 AM	---	5/14/2021 10:4...
---	Open	simone17giordano...	66.249.81.2...	---	5/14/2021 7:52 AM	---	5/14/2021 10:1...
1456	Send	#1	No defined	---	5/14/2021 7:50 AM	---	5/14/2021 10:1...



# SMS VIEW

The screenshot shows the 'SMS VIEW' interface. On the left is a sidebar with categories: Communications, Campaigns, Marketing Lists, Campaigns, Campaign Activity, Customers, and Templates. Under 'Communications', 'Email Messages' and 'SMS' are listed, with 'SMS' highlighted by a red box and a hand cursor. Under 'Campaigns', 'Marketing Lists', 'Campaigns', and 'Campaign Activity' are listed. Under 'Customers', 'Contacts', 'Accounts', and 'Leads' are listed. Under 'Templates', 'MailUp Console' is listed. The main area shows a table of SMS records. At the top of the table is a dropdown menu labeled 'All SMS' with a red box around it. Below the table is a search bar labeled 'Search this view'. The table has columns: Mail, To, Phone Nu..., Status Reas..., and Subject. The first row shows a record for Simone Giordano with phone number 3460432537, status 'Draft', and subject 'Richiesta partecipazione'. The second row shows a record for Simone Giordano with phone number 3460432563, status 'Draft', and subject 'Info'. The third row shows a record for Simone Giordano with phone number 3892786019, status 'Draft', and subject 'test 5'. The fourth row shows a record for Simone Giordano with phone number 3873450952, status 'Draft', and subject 'Partecipazione contest'. The fifth row shows a record for Cluster Reply srl with phone number 3467689331, status 'Draft', and subject 'Invito evento'. The sixth row shows a record for Simone Giordano with phone number 3460432568, status 'Draft', and subject 'Templates SMS'. A red dashed box highlights the first two rows of the table. A red dashed box highlights the 'Status Reas...' column header. A red dashed box highlights the 'Subject' column header. A red dashed box highlights the 'Text' dropdown menu in the top right corner. A red dashed box highlights the 'Communication recipient' column header. A red dashed box highlights the 'State of the record' column header. A red dashed box highlights the 'Search, filter, and display selection features described in slide 20 are available' text.

Communications

- Email Messages
- SMS**

Campaigns

- Marketing Lists
- Campaigns
- Campaign Activity

Customers

- Contacts
- Accounts
- Leads

Templates

- MailUp Console

Placeholder

- Email Placeholder
- SMS Placeholder

Settings

- Configuration
- Personal Credentials
- MailUp Lists
- SMS Limits

External Link

- MailUp Console

Search this view

Mail	To	Phone Nu...	Status Reas...	Subject
GR...	Simone Giordano	3460432537	Draft	Richiesta partecipazione
Li...	Simone Giordano	3460432563	Draft	Info
	Simone Giordano	3892786019	Draft	test 5
	Simone Giordano	3873450952	Draft	Partecipazione contest
	Cluster Reply srl	3467689331	Draft	Invito evento
	Simone Giordano	3460432568	Draft	Templates SMS

It is possible to select specific views to display

State of the record

Communication recipient

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



# CREATE A NEW SMS

**System populates the field automatically after having inserted recipient**

**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**

**Area where you can enter the message**

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

Other Activities

SMS

Save

Simone Giordano

3460432568

News

Templates SMS

Cluster Reply srl

Templates SMS

Administration

Timeline

Enter a note...

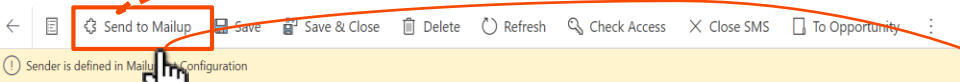
Get started

Capture and manage all records in your timeline.

Ciao, questo è un messaggio di prova. Saluti

# INVIO SMS

User selects «Send to MailUp»



Partecipazione contest  
SMS

Open Activity Status  
Draft Status Reason  
Simone Giordano Owner

General Administration Related

To \* Simone Gior...

Phone Number \* 3873450952

Mailup List News

Template SMS ---

Subject \* Partecipazione co...

Regarding compact-2602

All SMS

Due  
All

<input checked="" type="checkbox"/>	Mailup List	To	Phone Nu...	Status Reas...	Subject	Text	Regarding	Date Created
	GRM - Test Sys	Simone Giordano	3460432537	Draft	Richiesta partecipazione	Vieni con noi oggi? Saluti	---	6/21/2021 11:...
	Lista per prove	Simone Giordano	3460432563	Draft	Info	Ciao, sei disponibile stasera? Buona serata	---	6/21/2021 11:...
	---	Simone Giordano	3892786019	Draft	test 5	---	attività 11/05	6/21/2021 11:...
	News	Simone Giordano	3873450952	Draft	Partecipazione contest	Partecipa al contest MailUp e vinci fantas...	compact-2602	6/21/2021 11:...
	Lista per prove	Cluster Reply srl	3467689331	Draft	Invito evento	Partecipa al nostro evento. Non perdere ...	2206 2	6/21/2021 11:...
	News	Simone Giordano	3460432568	Draft	Templates SMS	Ciao, questo è un messaggio di prova. S...	Cluster Reply srl	6/17/2021 5:3...
	News	Cluster Reply srl	33322211134...	Draft	test 3	---	13052021_1	6/15/2021 5:4...

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

← Save Save & Close + New Flow

New Campaign  
Campaign · Campaign - MailUp

No Template  
--- Estimated Revenue  
Proposed Status Details  
Si Ow

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

Summary Details

## CAMPAIGN

Name \* Campagna numero 1

Campaign Code CMP - 01043 - T3R6S9

Currency \* EUR

Campaign Type Advertisement

Expected Response(%) ---

## Timeline



Almost there

Select Save to see your timeline.

## SCHEDULES

Proposed Start

---



Proposed End

---



Actual Start

---



Actual End

---



# 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 'Campaign Activity' interface for a campaign with ID 13052021. The interface includes a top toolbar with actions like Save, Save & Close, Delete, Refresh, Check Access, Distribute Campaign, and Close Campaign Activity. A yellow banner at the top indicates 'Distribution completed.' The main section is titled 'Campaign Activity' and shows a 'SUMMARY' tab. The 'Channel' field is highlighted with a red box, and a dropdown menu is open, showing options: Research, Content Preparation, Target Marketing List Creation, Lead Qualification, Content Distribution, Direct Initial Contact, Direct Follow-Up Contact, Reminder Distribution, and Email via MailUp. The 'Email via MailUp' option is selected. The right sidebar shows 'MailUp Information' with fields for Sender (Valerio Arcerito), Email Template (Cluster Reply), and MailUp List (News). The bottom section shows a 'Timeline' with a search bar.

13052021  
Campaign Activity · MailUp C

**Campaign Activity** Relate

SUMMARY

Subject \*

Used in Campaign \*

Type

Channel \* **Email via MailUp**

Description ---

--Select--  
Research  
Content Preparation  
Target Marketing List Creation  
Lead Qualification  
Content Distribution  
Direct Initial Contact  
Direct Follow-Up Contact  
Reminder Distribution  
Research

Normal Priority  
Proposed Status Details  
Valerio Arcerito Owner

MailUp Information

Sender \* <Valerio Arcerito>

Email Template \* Cluster Reply

MailUp List News

Timeline

Search timeline



# MAILUP EMAIL

After having inserted all the informations click on «Save»

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

The screenshot shows the MailUp campaign creation interface. At the top, there are two 'Save' buttons. A dashed orange box highlights the first 'Save' button, with a callout stating: 'After having inserted all the informations click on «Save»'. Below this, the 'Campaign Activity' section is visible. A dashed orange box highlights the 'Subject' field, which contains 'Campagna MailUp', with a callout stating: 'The subject of a campaign ACTIVITY can contain a maximum of 10 characters.' Another dashed orange box highlights the 'Channel' field, which contains 'Email via MailUp', with a callout stating: 'User selects «Email via MailUp»'. A third dashed orange box highlights the 'Sender' field, which contains 'Simone Giordano', with a callout stating: 'User inserts sender and template to use'. A fourth dashed orange box highlights the 'Email Template' field, which contains 'template di prova', with a callout stating: '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.' The interface also shows a 'MailUp List' field with 'News' selected, a 'Timeline' section with a search bar, and a 'Verifica mittente' (Verify sender) button.

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.

## Verifica mittente

Clicca su **Verifica mittente** per confermare [a.dispoto@reply.it](mailto:a.dispoto@reply.it) come mittente autorizzato.

Verifica mittente

# MAILUP EMAIL

← | | Save | Save & Close | Delete | Refresh | Check Access | **Distribute Campaign ...** | Close Campaign Activity | ⋮

⚠ Distribution completed.

### Campagna MailUp

Campaign Activity · MailUp Campaign Activity ▾

**Campaign Activity** Related

**SUMMARY**

Subject \* **Campagna MailUp**

Used in Campaign \* [Campagna con template nuovo](#)

Type **Research**

Channel \* **Email via MailUp**

Description ---

**MailUp Information**

Sender \* [Simone Giordano](#)

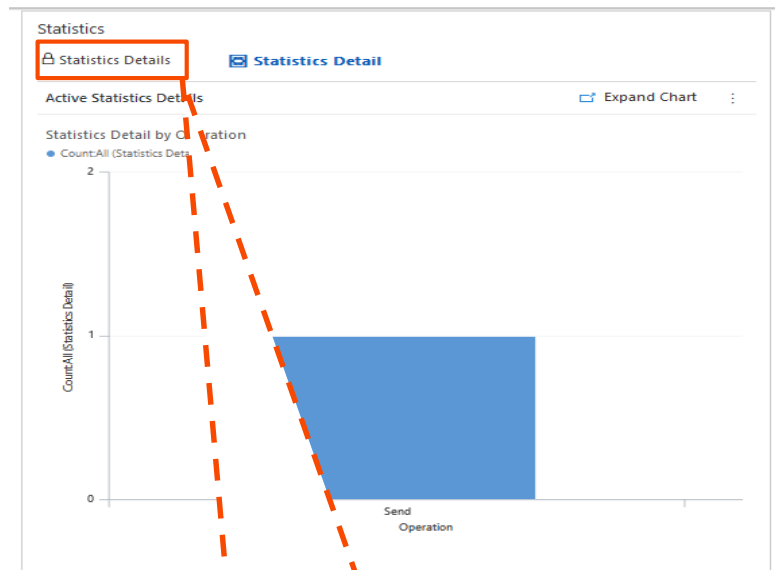
Email Template \* [template di prova](#)

MailUp [News](#)

Timeline  + 🔍 ⌵ ⌶ ⌵ ⌵

Open Save

User can distribute tasks



System automatically populates the «statistics Details» field



# ACTIVITY VIEW

The screenshot displays the 'ACTIVITY VIEW' interface for a campaign. At the top, a toolbar includes buttons for navigation and actions: 'Distribute Campaign ...' (highlighted with a red box and a hand cursor), 'Close Campaign Activity', and 'Update Statistics'. Below the toolbar, the campaign details are shown: '13052021', 'Campaign Activity · MailUp Campaign Activity', 'Normal' priority, 'Proposed' status, and 'Valerio Arcerito' as the owner. The main content area is divided into three sections: 'SUMMARY', 'MailUp Information', and 'Statistics'. The 'SUMMARY' section lists details like 'Subject: 13052021', 'Used in Campaign: C\_17062020', 'Type: Research', 'Channel: Email via MailUp', and 'Description: ---'. The 'MailUp Information' section shows 'Sender: <Valerio Arcerito>', 'Email Template: Cluster Reply', and 'MailUp List: News'. The 'Statistics' section shows 'Distribution completed.' and a 'Timeline' section. The 'Timeline' section is highlighted with a red box and contains a search bar, a note entry field, and a list of events. One event is visible: 'Email from <Valerio Arcerito>' with the text 'Learn more about Cluster Reply' and 'Hello, Valerio Some news about Cluster R...'. The event is marked as 'Closed' and occurred on '5/13/2021 3:37 PM'. A red arrow points from the 'Distribute Campaign ...' button to the 'Timeline' section. A dashed red box at the bottom contains the text 'System creates its records within the timeline section'.

13052021  
Campaign Activity · MailUp Campaign Activity

Campaign Activity Related

SUMMARY

Subject \* 13052021

Used in Campaign \* C\_17062020

Type Research

Channel \* Email via MailUp

Description ---

MailUp Information

Sender\* <Valerio Arcerito>

Email Template Cluster Reply

MailUp List News

Statistics

Statistics Details

Distribution completed.

13052021  
Campaign Activity · MailUp Campaign Activity

Campaign Activity Related

Timeline

Search timeline

Enter a note...

Email from <Valerio Arcerito>  
Learn more about Cluster Reply  
Hello, Valerio Some news about Cluster R...  
Closed 5/13/2021 3:37 PM

CountAll (Statistics Detail)

System creates its records within the timeline section



# EMAIL VIEW

**Test mail prova**  
Campaign Activity - MailUp Campaign Activity

**Campaign Activity** Related

Type **Research**

Channel **Email via MailUp**

Description ---

Timing

Scheduled Start ---

Scheduled End ---

Actual Start 2/21/2020

Actual End 2/21/2020

Open

Timeline

Search timeline

Enter a note...

Email from <Antonio Dispoto>  
This is the Dynamics 365 + MailUp Connector  
This is the new release of our Dynamics 365 + Mail...  
Closed 2/21/2020 4:29 PM

Email from <Antonio Dispoto>  
This is the Dynamics 365 + MailUp Connector  
This is the new release of our Dynamics 365 + Mail...  
Closed 2/21/2020 4:29 PM

Statistics Detail by Operation

CountAll (Statistics Detail)

Completed

Read-only This record's status: Completed

This email was sent with MailUp

**This is the Dynamics 365 + MailUp Connector**  
Email - Email - MailUp

**Email** Related

Regarding **Test mail prova**

This is the new release of our Dynamics 365 + MailUp Connector.

**REPLY**  
CLUSTER

Clicks ---

Last Update 3/12/2020 2:02 PM

Attachment

No data available.

Completed



# CAMPAIGN ACTIVITY STATISTICS

Test mail prova

Campaign Activity MailUp Campaign Activity

Campaign Activity Related

## SUMMARY

Subject	Test mail prova
Used in Campaign	Test 21/02
Type	Research
Channel	Email via MailUp
Description	---

## Timing

Scheduled Start	---
Open	---

Normal Proposed Antonio Dispolo

Priority Status Details Owner

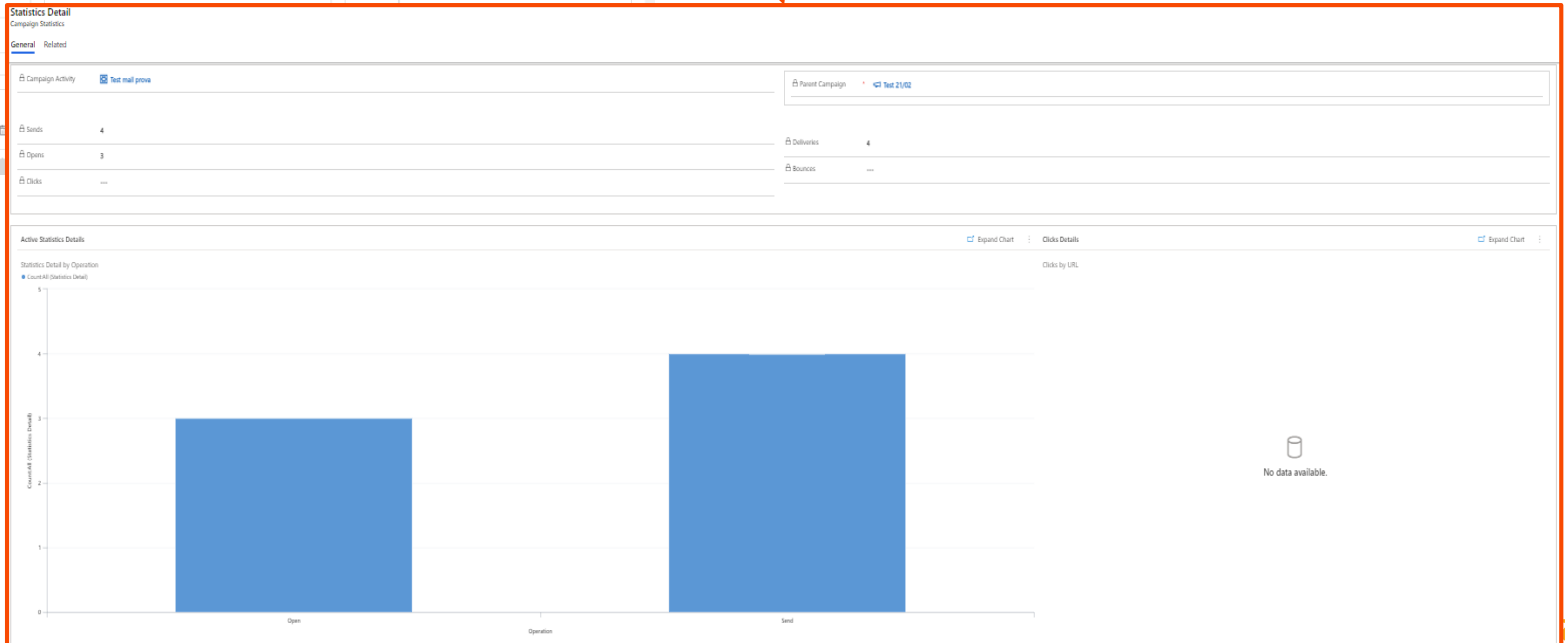
## MailUp Information

Sender	<Antonio Dispolo>
Email Template	ConvaTec
MailUp List	News

## Statistics

Statistics Details	Statistics Detail
Active Statistics Details	Expand Chart
Statistics Detail by Operation	CountAll (Statistics Detail)

User can view the details



# CAMPAIGN STATISTICS

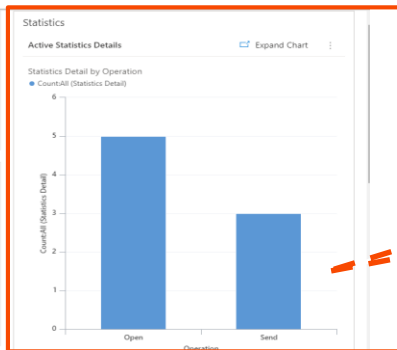
CC Campagna con template nuovo  
Campaign - Campaign - MailUp

Summary Details Related

<b>CAMPAIGN</b>	
Name	Campagna con template nuovo
Campaign Code	7d5g
Currency	EUR
Campaign Type	Advertisement
Expected Response(%)	---

<b>SCHEDULES</b>	
Proposed Start	---
Proposed End	---
Actual Start	---
Actual End	---

No €0 Proposed Simone Giordano  
Template Estimated Revenue Status Details Owner



User can see the graphical representation of campaign-related statistics

Campagna MailUp  
Campaign Activity - MailUp Campaign Activity

Campaign Activity Related

<b>SUMMARY</b>	
Subject	Campagna MailUp
Used in Campaign	Campagna con template nuovo
Type	Research
Channel	Email via MailUp
Description	---

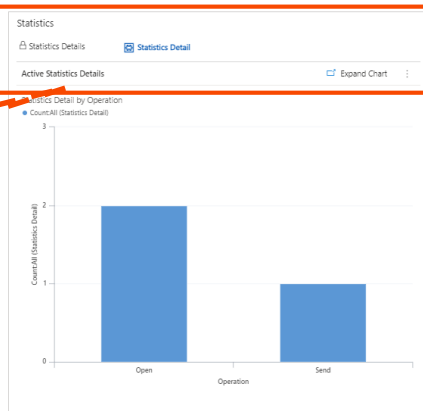
MailUp Information

Sender Simone Giordano  
Email Template template di prova  
MailUp List News

Timeline

Search timeline

Email from Simone Giordano  
testare funzionalità template  
Ciao Simone Giordano. Questa è la tua immagine di risulta che tu lavori per ti contatteremo al 34624...  
Close



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

FINANCIALS

Currency EUR





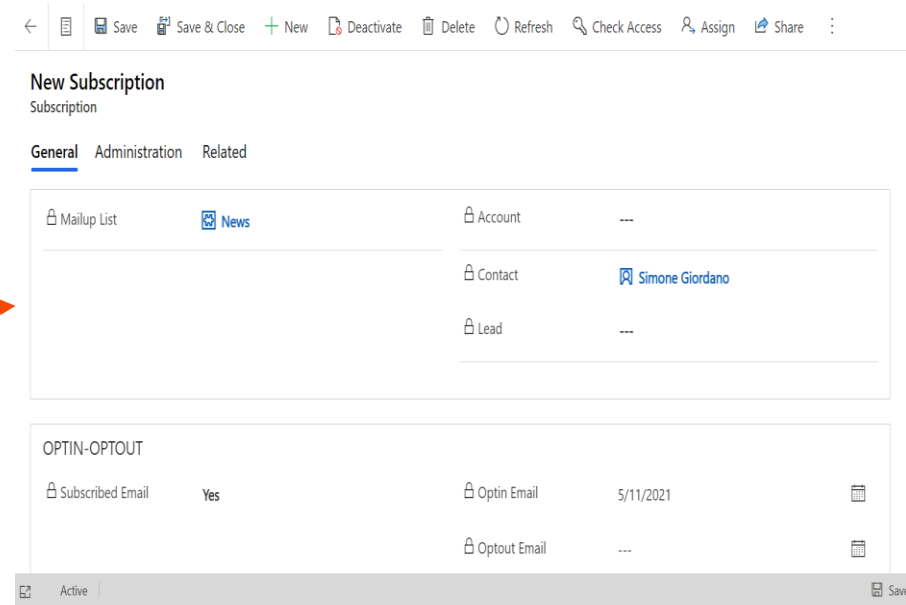
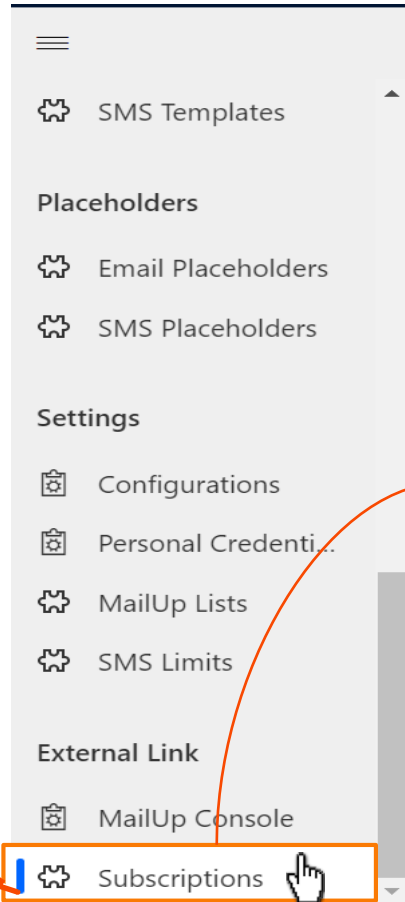
# SUBSCRIPTIONS



# 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



# SUBSCRIPTIONS

## New Subscription

Subscription

General Administration Related

Mailup List	News	Account	---
		Contact	Simone Giordano
		Lead	---

OPTIN-OPTOUT			
Subscribed Email	Yes	Optin Email	5/11/2021
		Optout Email	---
Subscribed SMS	No	Optin SMS	---
		Optout SMS	---

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

Subscriptions are updated daily



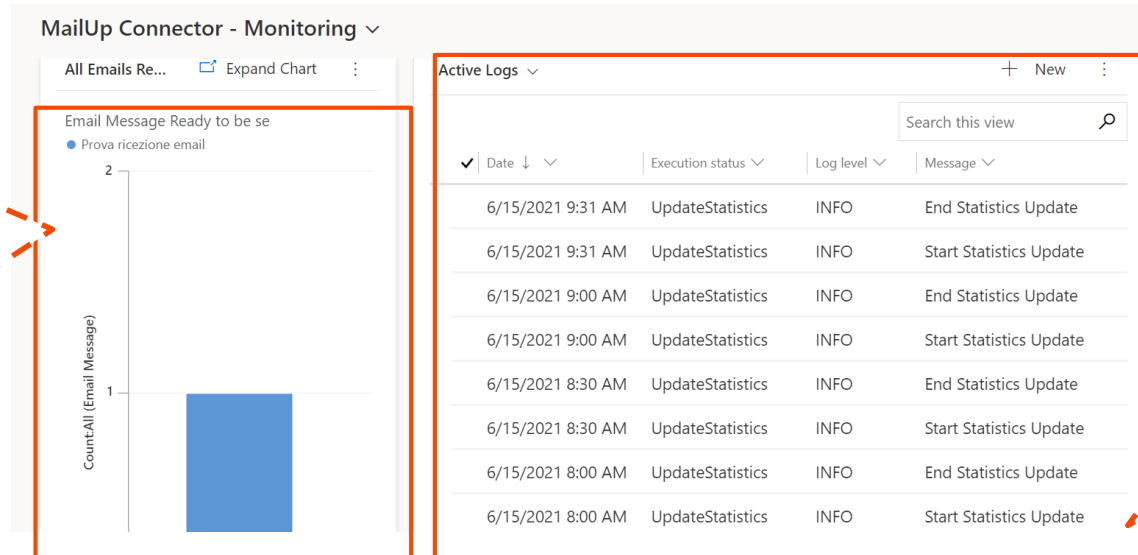
# DASHBOARDS



# 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)

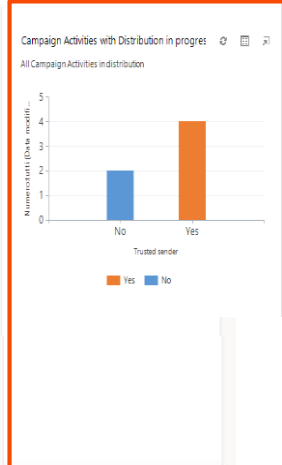
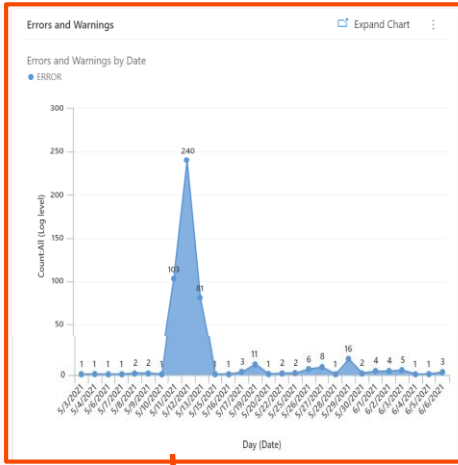
User displays, for each campaign, the Email message ready to be sent



User displays the active logs view



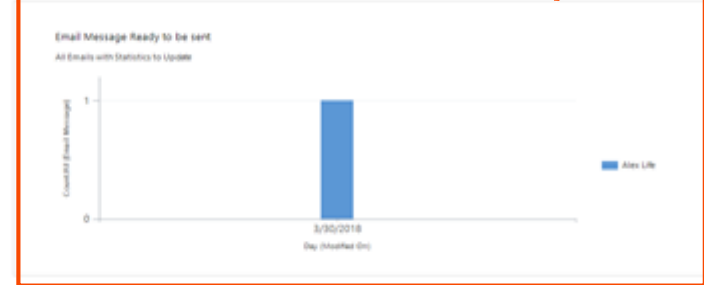
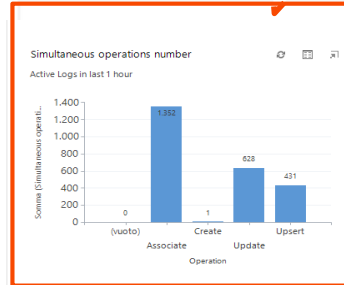
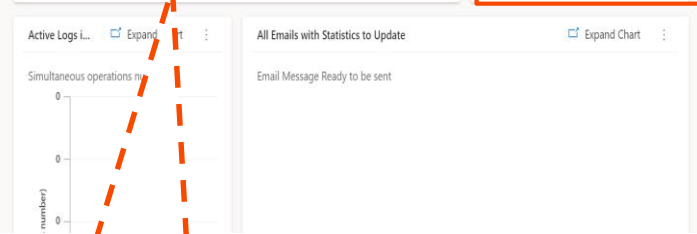
# DASHBOARDS



Users displays campaign activities with distribution in progress

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

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



User displays errors sorted by date



