

DYNAMICS 365 + MAILUP CONNECTOR

1-Day Assessment



Cluster Reply has developed a specific integration between MailUp functionalities and Dynamics 365. This Assessment is the perfect way to start talking about connector features and your requirements.

OFFERING DESCRIPTION

This assessment is focused on Cluster Reply [MailupConnector](#) solution in order to provide example and knowledge about this "out of the box" integration.

Goal of this meeting is to present Cluster Reply solution, install free (or professional) version inside the Customer environment and collect new requirements related to different Business objectives.

This requirements could be the base for new features development and personalized version of this integration, in order to tailor this solution for specific needs.

Agenda:

- Dynamics 365 + Mailupconnector demonstration
- New Requirement Collections
- Provisioning of demo environment
- Connector (light) installation in your Development Dynamics 365 Customer Environment

Deliverables:

- Office Excel document on new requirements
- Demo environment
- Cluster Reply effort and planning in order to develop Customer specific features



MAIN FEATURES



NEW «MAILUP CONNECTOR» MODERN DRIVEN APP

The screenshot displays the Dynamics 365 Sandbox interface. At the top, a dark blue header bar contains the 'Dynamics 365' logo on the left, the word 'SANDBOX' in the center, and a settings gear icon and a question mark icon on the right. Below the header, the main area is a grid of app tiles. Each tile has a dark blue header with an icon, a title, a description, a date, and a 'UNIFIED INTERFACE' badge. The tiles are arranged in two rows. The first row contains five tiles: 'Dynamics 365 — custom', 'CRM Hub', 'Customer Service Hub', 'Customer Service worksp...', and 'Dynamics 365 App for O...'. The second row contains three tiles: 'Mailup Connector', 'Sales Team Member', and 'Solution Health Hub'. To the right of the main grid is a vertical sidebar menu with a search icon at the top. The menu is organized into sections: '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 Credent..., MailUp Lists, SMS Limits), and 'External Link' (MailUp Console).

Dynamics 365 **SANDBOX**

Dynamics 365 — custom
Provides access to the full suite of capabilities, including administration
Microsoft Dynamics 365
6/14/2021
WEB

CRM Hub
Mobile app that provides core CRM functionality including accounts,
Dynamics 365
UNIFIED INTERFACE

Customer Service Hub
A focused, interactive experience for managing your customer service.
Default Publisher for clusterdynamics-a...
2/8/2020
UNIFIED INTERFACE

Customer Service worksp...
Multi-session Customer Service with Productivity tools
Dynamics 365
UNIFIED INTERFACE

Dynamics 365 App for O...
Provides access to Dynamics 365 App for Outlook for enabled users.
Dynamics 365
UNIFIED INTERFACE

Mailup Connector
MailUp Connector + Dynamics 365 Unified Interface App
Default Publisher for clusterdynamics-a...
3/17/2020
UNIFIED INTERFACE

Sales Team Member
Team Member access to the Dynamics 365 Sales app module.
Dynamics 365
UNIFIED INTERFACE

Solution Health Hub
Solution Health Hub enables rules-based validation on the health of
Dynamics 365
UNIFIED INTERFACE

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 Credent...
MailUp Lists
SMS Limits
External Link
MailUp Console



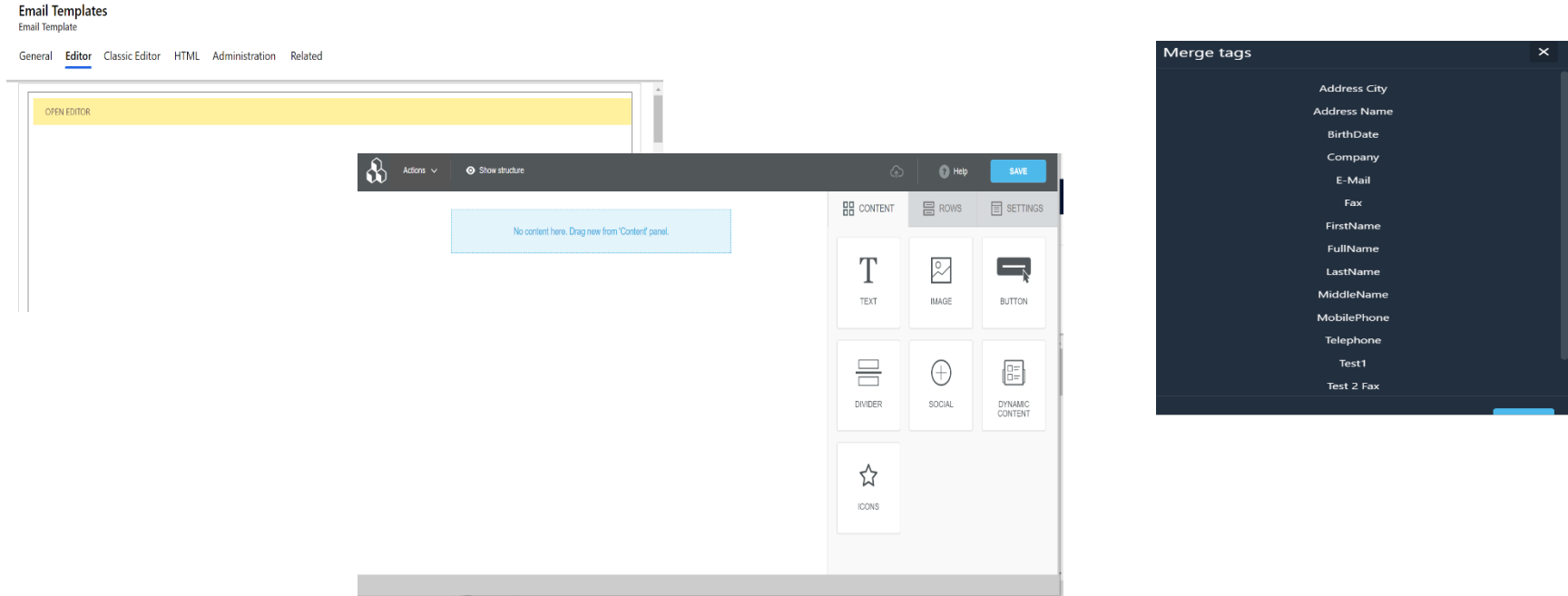
EMAIL + SMS TEMPLATE CONFIGURATION



With integrated BEE Plugin, you can create email templates and SMS template directly into Dynamics 365.



DYNAMIC TAGS



Inside SMS and emails, you can refer CRM information by using tags that can retrieve customer data directly from Dynamics 365



CAMPAIGN MODULE INTEGRATION

← Save Save & Close + New Flow

New Campaign
Campaign · Campaign · MailUp


No Template --- Estimated Revenue Proposed Status Details Simone Giordano Owner

Summary Details

CAMPAIGN

Name	* Campagna numero 1
Campaign Code	CMP - 01043 - T3R659
Currency	* EUR
Campaign Type	Advertisement
Expected Response(%)	---

Timeline



Almost there

Select Save to see your timeline.

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

1 Distribution completed.

Campagna MailUp
Campaign Activity · MailUp Campaign Activity

Normal Priority Proposed Status Details Simone Giordano Owner

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 List	News

Timeline

Search timeline

Open Save

Communication campaigns can be defined through:

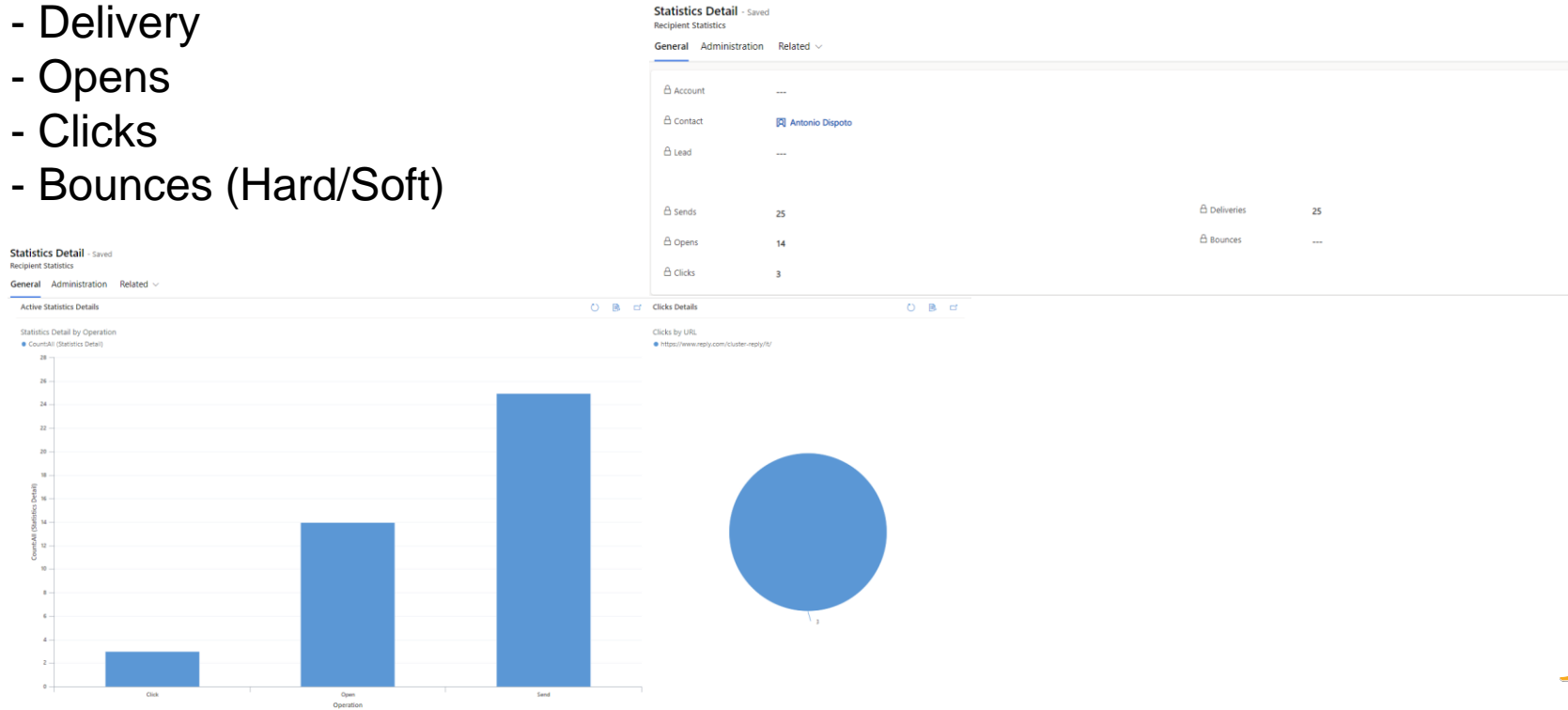
- Target
- Email Template and/or
- SMS Template



STATISTICS SYNCHRONIZATION

On Dynamics 365 CRM all statistic information about communications will be available, such as:

- Delivery
- Opens
- Clicks
- Bounces (Hard/Soft)



CUSTOMER DATA SYNC

The screenshot displays the MailUp console interface, illustrating the synchronization of customer contact information. On the left, the 'CONTACT INFORMATION' section lists details for 'Alessandro Vita', including First Name, Last Name, Job Title (Partner), Account Name, Email (a.vita@reply.it), Business Phone, Mobile Phone (0039393665998723), Fax, and Preferred Method of Contact (Any). The main area shows a 'Timeline' with a search bar and a note entry field. Below this, a 'mailup' logo is visible. The central part of the interface shows the contact's profile for 'a.vita@reply.it' with tabs for 'Recipients', 'Email', and 'Summary'. The 'Recipients' tab is active, showing a list of recipients with columns for 'Email Channel', 'Status', and 'Engagement'. Two recipients are listed: one for 'Email' (a.vita@reply.it) and one for 'SMS Channel' (0039393665998723), both with a 'SUBSCRIBED' status. The right side of the interface shows 'Custom fields' for the contact, including 'FirstName' (Alessandro Vita), 'LastName' (Vita), and 'Company' (-).

CONTACT INFORMATION

First Name: Alessandro
Last Name: Vita
Job Title: Partner
Account Name: ---
Email: a.vita@reply.it
Business Phone: ---
Mobile Phone: 0039393665998723
Fax: ---
Preferred Method of Contact: Any

Timeline

Search timeline
Enter a note...

Auto-post on Contact Alessandro Vita: 2:07 PM
Contact created by Antonio Dispo

mailup

a.vita@reply.it
Recipients / Email / Summary

Recipients

Email Channel Unsubscribe

Email: a.vita@reply.it
Status: SUBSCRIBED on 2017-06-08 16:03 Details
Engagement: ★★★★★

SMS Channel Unsubscribe

Mobile phone number: 0039393665998723
Status: SUBSCRIBED on 2017-06-08 16:08 Details

Custom fields

FirstName: Alessandro Vita
LastName: Vita
Company: -
Show all fields

Customer contact information can be automatically synchronized through Dynamics 365 and MailUp console



VERSIONS & PRICING



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		Light	Pro	Custom
CRM	Email Template Configuration	✓	✓	Tailored on your needs Contact Us!
	SMS Template Configuration	✓	✓	
	Single communication send	✓	✓	
	Statistics Manual Sync	✓	✓	
	Customer contact manual sync	✓	✓	
	MailUp Console direct access	✓	✓	
	MailUp Dashboard integrations	✓	✓	
Sync	Massive Communications Send		✓	
	Template Sync		✓	
	Automatic Statistic Sync		✓	
	Unsubscriptions		✓	
	Scheduled Send		✓	
Support	Updates		✓	
	Support		✓	



MAILUP CONNECTOR PRO VERSION PRICING

1) Standard connector managed by Cluster Reply **as a service**: it does not require installation or maintenance by the customer but requires a version of Dynamics 365 Online (v.8.2 or higher). Annual license fee of € 799 + VAT.

2) Standard connector installed **on premise on a customer's machine**: it works both on Dynamics 365 online and on-premise, from version 8.2 on. Annual license fee of € 499 + VAT.

3) Custom connector (managed both on-premise and online) through specific implementations that we carry out according to the required needs or the customizations made on Dynamics. Cost to be defined during the assessment phase.

THANK YOU

www.clusterreply.it
www.cluster.reply.it

