

DYNAMICS 365 + MAILUP CONNECTOR

Alessandro, Vita | Product Manager



Dynamics 365 + MailUp Connector (made by Cluster Reply) allows you to use all Dynamics CRM features in order to send email/sms through a MailUp subscription and save statistics inside CRM.

MAIN FEATURES



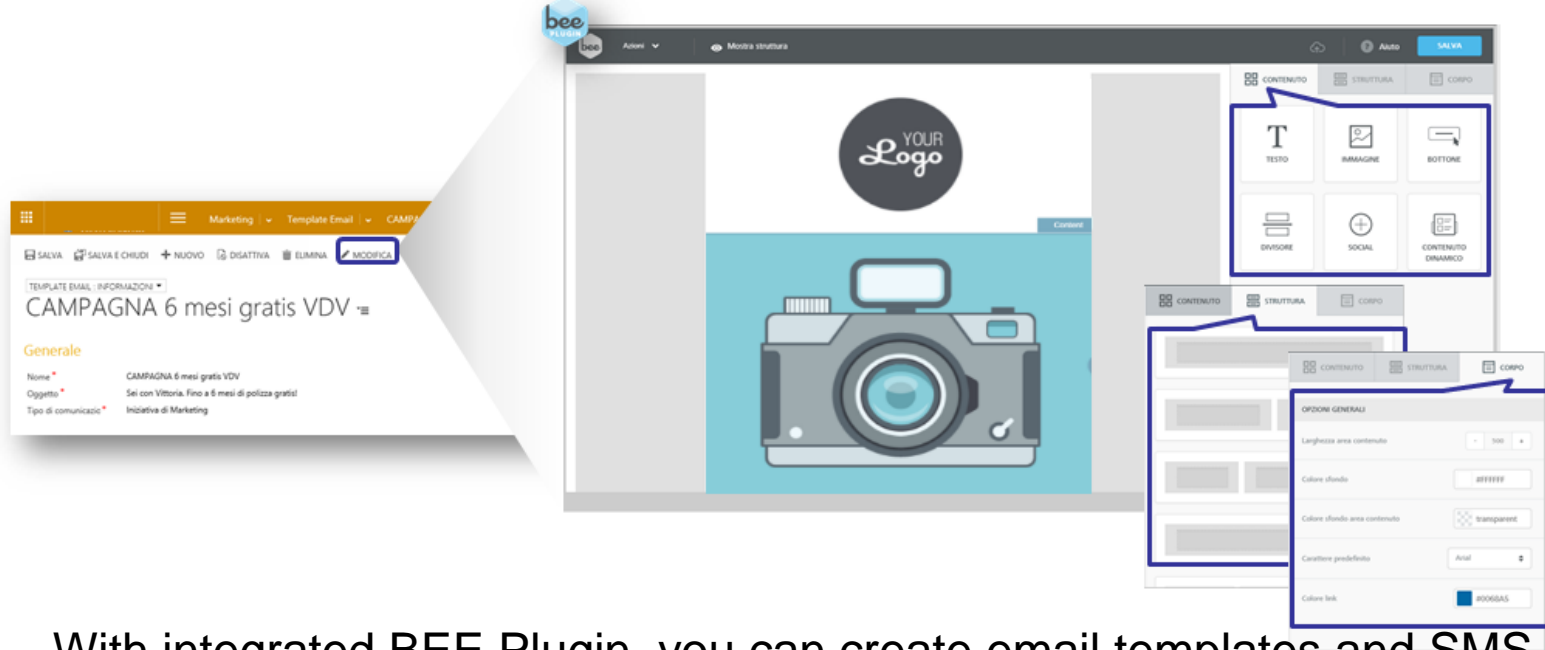
NEW «MAILUP CONNECTOR» SECTION IN SITEMAP

The screenshot displays the Dynamics 365 Sales dashboard. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Dashboards'. Below this, a row of tiles represents different functional areas: Sales, Service, Marketing, MailUp Connector (highlighted with an orange box), Settings, and Training. The MailUp Connector tile is blue with a gear icon. Below the navigation bar, the 'MailUp Connector' section is expanded, showing a 'Settings' sub-section. This sub-section contains several options: Communications (Email, SMS), Templates (Email Template, SMS Templates), Placeholders (Email Placeholders, SMS Placeholders), Configurations, Personal Credentials, and MailUp Lists. The bottom of the dashboard features a funnel chart on the left and a list of recent activity on the right. The funnel chart shows three segments with values: \$31,833,521.00 (blue), \$35,200,883.04 (orange), and \$29,861,364.00 (purple). The activity list includes three entries, each with a warning icon, a title, a description, and a timestamp of 7/13/2017 3:52 AM.

Activity	Competitor	Action	Timestamp
3D Printers for GDI	Carter Electronics	added to Opportunity by MOD Administrator	7/13/2017 3:52 AM
Northwind Printers	Carter Electronics	added to Opportunity by MOD Administrator	7/13/2017 3:52 AM
Desktop and Laptop Upgrades	Carter Electronics	added to Opportunity by MOD Administrator	7/13/2017 3:52 AM



EMAIL + SMS TEMPLATE CONFIGURATION



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



DYNAMIC TAGS

The screenshot displays the Dynamics 365 user interface. At the top, there is a navigation bar with the text 'New opportunity' and a search bar labeled 'Cerca dati CRM'. Below this, a dropdown menu titled 'Campi dinamici' (Dynamic Fields) is open, showing a list of fields that can be inserted into a template. The fields include: Cliente-Indirizzo di residenza, Cliente-Nome, Cliente-Professione, Cliente-Professione (Macrosettore), Cliente-Stato civile, Cliente-Nome e Cognome Cliente, Cliente-Provincia, Agenzia-Bianca di appoggio, Agenzia-Filiale, Agenzia-IBAN, and Agenzia-Intestatario IBAN. The main content area shows an email template titled 'New oppo' with fields for 'Nome', 'Oggetto', and 'Tipo di comunicazione'. Below the template, there is a preview section labeled 'Anteprima' showing the rendered email content. The preview includes the text 'BE RELEVANT' and a salutation 'Dear [Cliente-Nome],'. A blue box highlights the dynamic tag '[Cliente-Nome]' in the salutation, and a blue arrow points from the 'Campi dinamici' dropdown to this tag.

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



CAMPAIGN MODULE INTEGRATION

Marketing Campaign

Parametri di configurazione

Tipo Target: Dinamico

Consenti modifica Target e Canali di comunicaz: No

Target Anagrafiche: List Customer 2016

Anagrafiche escluse: Selezionare la Vista Esclusione

Canali

Canale	Stato	Template	Opportunità
Canale preferito Anagrafica	No		
Canale E-mail	SI	Template Email	New opportunity
Canale SMS	SI	Template SMS	New Opportunity
Canale Lettera	No	Template Lettera	--
Canale Prioritario	No		
Canale Alternativo	--		

Marketing Campaign - Generale

Nome: Johnson Jack

Proprietario: administrator system

Invia Email MailUp: Invia

Motivo stato: Invia

Anagrafica: Johnson Jack

Message Error: --

HTML

Communication campaigns can be defined through:

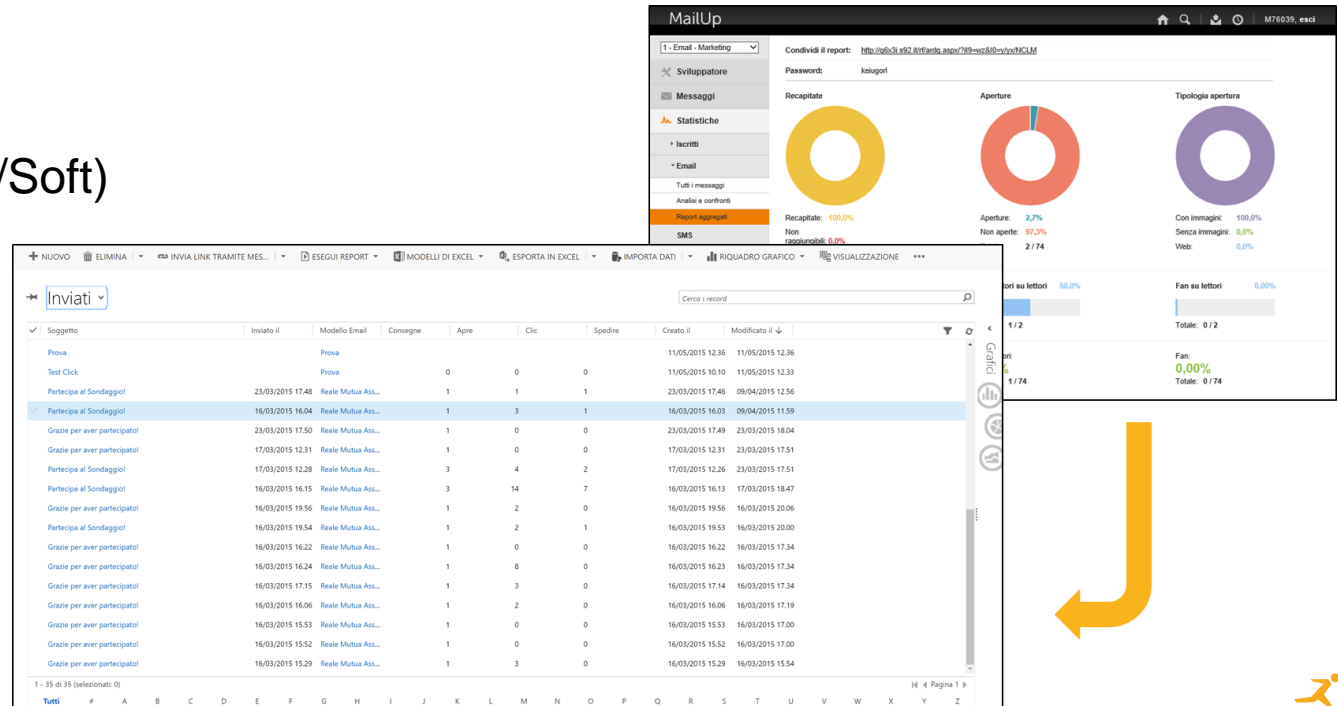
- Target
- Email Template and/or
- SMS Template



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 image displays a screenshot of the MailUp console interface, illustrating the synchronization of customer contact information. A large yellow double-headed arrow points from the Dynamics 365 interface on the left to the MailUp interface on the right.

Dynamics 365 Interface (Left):

- ACCOUNT:** Avventure di sogno (esempio)
- INFORMAZIONI SULL'ACCOUNT:**
 - Nome account: Avventure di sogno (esempio)
 - Telefono: 234 56 78 90
 - Fax: --
 - Sito Web: <http://www.adventure-works.com>
 - Account padre: --
 - Simbolo del titolo: --
- INDIRIZZO:**
 - Piazza Giovedi 112
 - 25100 Novara (Sardagna)
 - Italia

MailUp Interface (Right):

- Header:** a.vita@reply.it (Recipients / Email / Summary)
- Summary:**
 - Email: a.vita@reply.it
 - Email recipient status: Subscribed on 2017-06-08 16:03 UTC+01:00
 - Mobile phone number: 0039393665998723
 - Mobile phone number status: Subscribed on 2017-06-08 16:08 UTC+01:00
 - SMS recipient status: Subscribed on 2017-06-08 16:08 UTC+01:00
- Custom fields:**
 - FirstName: Alessandro
 - LastName: Vita
 - Company: -
- Activity Stream:**
 - Subscribed: 2017-06-08 16:03 UTC+01:00
 - Subscribed: 2017-06-08 16:08 UTC+01:00

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



VERSIONS & PRICING



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		Light FREE	Pro 499€/year *	Custom
CRM	Email Template Configuration	✓	✓	<div>Tailored on your needs</div> <div>Contact Us! dynamics365@reply.it</div>
	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		✓	

*Pro Version requires installation of software components on server or Customer pcs. In this pricing no infrastructure hardware, cost, or installation is included for PRO Version. MailUp Subscription is not included in both versions of the solution (Light and PRO)



UPDATES & SUPPORT

FOR «PRO» VERSION

PRO version of this connector
INCLUDES:

- Software Updates,
- Continuous integration with new version of Dynamics 365
- New features
- User Manuals
- Bug Fixing
- Dedicated Mail Support
- Monthly Newsletter



THANK YOU

www.reply.com

