



Cherry Connect

User Guide

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Cherry Connect

Send your segments as marketing campaigns or e-mailing lists to your preferred e-mailing service. Get feedbacks from contacts that unsubscribe or do not want to be contacted anymore.

This application is currently compatible with the following services:

- Mailjet (<https://www.mailjet.com>)

Supported languages:

English, French

Supported editions:

This app supports both Essential and Premium editions of Microsoft Dynamics 365 Business Central.

Supported countries:

France, United States

User Guide

E-mailing

This application provides e-mailing services based on segments. To get more information, refer to the [dedicated page](#).

Print Cover Sheets

On several pages, you can print Cover Sheets to print the address of your contacts on a blank page or on an envelope. Search for **Print Cover Sheets** on these pages:

- Customer List: select several customers to print a cover sheet per company contact.
- Customer Card
- Contact List: select several contacts to print a cover sheet per contact.
- Contact Card
- Segment List: prints one cover sheet per contact in the selected segment.
- Segment Card: prints one cover sheet per contact in the segment.

For instance, from the customer list:

1. Select customers you want to print the cover sheets.
2. Choose **Print Cover Sheets**.

The screenshot shows a software interface for managing customers. At the top, it says 'CUSTOMERS | WORK DATE: 4/6/2020'. Below this is a table of customer records. Three records are selected (checked): 'Trey Research', 'School of Fine Art', and 'Alpine Ski House'. A context menu is open over the selected records, showing options like 'Open in Excel', 'Actions', 'Navigate', 'Report', 'SmartList', and 'Fewer options'. The 'Print Cover Sheets' option is highlighted with a red box.

No.	Salutation Code	Name	Post Code	Country/Regi... Code	Phor
<input type="radio"/>					
<input type="radio"/>	10000	Adatum Corporation	69001	FR	
<input checked="" type="checkbox"/>	20000	Trey Research	37000	FR	
<input checked="" type="checkbox"/>	30000	School of Fine Art	US-FL		
<input checked="" type="checkbox"/>	40000	Alpine Ski House	DE-80		
<input type="radio"/>	50000	Relecloud	75000		

3. In the page that opens, select the envelope size. If the desired size is not available, type the required address position.

COVER SHEETS 🔖 ↗

Print Settings >

Saved Settings >

Options

Envelope Format	<input type="text" value="DL"/>	▼
Left Margin	<input type="text" value="10"/>	10
Top Margin	<input type="text" value="4.5"/>	4.5
Font Size	<input type="text" value="8"/>	8

Filter: Customer

× No.	<input type="text" value="20000..40000"/>	▼
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+ Filter...

Filter totals by:

Export a segment to Excel

You can use the Business Central feature or use the action Export contacts (extended) in the segment card to export the segments to Excel. The extended version is provided by Cherry Connect and allow you to retrieve contact address, phone number, e-mail, ...

E-mailing

Pre-requisites

To use the e-mailing feature, you must have a subscription to one the supported e-mailing service. Please note we are not affiliated to any of these services. Please contact them to get more information about their offers.

Supported Service	Web site	Subscription Link
Mailjet	http://www.mailjet.com	https://app.mailjet.com/signup

Set up Mailjet service

To set up the Mailjet service,

1. Choose  and type **Manual Setup**.
2. Choose **Set up Mailjet**.
3. Enable the service and fill your *API Key* and *Secret Key*.

←
 + 
✓ SAVED   

Mailjet Setup

 Create Account
 Get my API Keys
 Test Connection

General

Enabled

Connection Settings

If you do not already have an account, select **Create Account** and start now! After creating an account, select **Get my API Keys** and enter them below.

API Key

Secret Key

Synchronize a segment

To synchronize a segment to your e-mailing service, follow these steps:

1. Choose  and type **Segments**.
2. Select or create a new segment.
3. In the **General** tab, select the **Service** you want to use.

← SEGMENT | WORK DATE: 4/6/2020 ✎ + 🗑️ ✓ SAVED 📄 🔗

SM10001 · Promotion des ventes

✓ Log 📄 Add Contacts... | Actions Navigate Report Fewer options

General Show more

Description No. of Lines 10

Salesperson Code MD No. of Criteria Actions 0

Date 1/23/2020 📅 Service

Lines | Manage More options 📄

Contact No.	Correspon... Type	Contact Company Name	Contact Name	Description
→ CT000001	Hard Copy	Adatum Corporation		Promotion des vent
CT000002	Hard Copy	Adatum Corporation	Philippe Quenneville	Promotion des vent
CT000007	Hard Copy	Alpine Ski House		Promotion des vent
CT000008	Hard Copy	Alpine Ski House	Ian Deberry	Promotion des vent

4. Choose  and choose **Synch.** e-mailing service.

← SEGMENT | WORK DATE: 4/6/2020 ✎ + 🗑️ ✓ SAVED 📄 🔗

SM10001 · Promotion des ventes

✓ Log 📄 Add Contacts... | Actions Navigate Report Fewer options

✓ Log ⚡ Functions 🖨️ Print 🔄 Synch. external service 📄

Description No. of Lines 10

Salesperson Code MD No. of Criteria Actions 0

Date 1/23/2020 📅 Service

Lines | Manage More options 📄

Contact No.	Correspon... Type	Contact Company Name	Contact Name	Description
→ CT000001	Hard Copy	Adatum Corporation		Promotion des vent
CT000002	Hard Copy	Adatum Corporation	Philippe Quenneville	Promotion des vent
CT000007	Hard Copy	Alpine Ski House		Promotion des vent
CT000008	Hard Copy	Alpine Ski House	Ian Deberry	Promotion des vent

You should get a confirmation message if the synchronization succeeds.

Important

If you modify your segment by adding or removing contacts, remember to synchronize the segment again with the e-mailing service.

View the segment in the e-mailing service

If the e-mailing service provider supports this feature, you can access to your campaign by following these steps:

1. Choose  and type **Segments**.
2. Select or create a new segment.
3. Choose  and choose **View e-mailing Campaign**.

This will open a new the campaign in a new page.

Frequently Asked Questions

How to get to know if a contact has unsubscribed from a segment?

You should first synchronize the segment with the e-mailing service.

Then, in the segment lines, you get the information in the field **Subscribed**. If the field is checked, it means the subscription is still active.

How to get to know if a contact is opening my e-mails?

You should first synchronize the segment with the e-mailing service.

Then, in the segment lines, you get the information in the field **Active**. If the field is checked, it means the contact opens your e-mails.

How-to change a contact subscription on a particular segment?

Go to the segment line and check or un-check the field **Subscribed**.

You should then synchronize the segment with the e-mailing service to apply the modification.

How-to unsubscribe a contact from all segments?

To unsubscribe a contact from all lists, follow these steps:

1. Choose  and type **Contacts**.
2. Choose the contact you want to update and opens its card.
3. Un-check the field **Exclude from Segment**.

The update is immediately sent to the e-mailing service.



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