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   action **Print**   Cover   Sheets.

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 · · · · · · · · · · · · · · ·   DL

Left Margin · · · · · · · · · · · · · · · ·   10

Top Margin · · · · · · · · · · · · · · · ·   4.5

Font Size · · · · · · · · · · · · · · · · · ·   8

Filter: Customer

✕ No. ·   20000..40000

+ Filter...

Filter totals by:

| Send to... | Print | Preview | Cancel |

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.

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

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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