

DYNAMICS 365 + MAILUP CONNECTOR

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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 dashboard is divided into several sections: Communications (Email, SMS), Templates (Email Template, SMS Templates), Placeholders (Email Placeholders, SMS Placeholders), and Settings (Configurations, Personal Credentials, MailUp Lists). The bottom section of the dashboard features a funnel chart on the left and a list of opportunities on the right. The funnel chart shows three segments: a top blue segment labeled '\$31,833,521.00', a middle orange segment labeled '\$35,200,883.04', and a bottom purple segment labeled '\$29,861,364.00'. The list of opportunities on the right includes three entries, each with a warning icon and a timestamp of 7/13/2017 3:52 AM. The first entry is '3D Printers for GDI' with a value of 20,000,000.00. The second entry is 'Northwind Printers' with a value of 15,000,000.00. The third entry is 'Desktop and Laptop Upgrades' with a value of 10,000,000.00. The values for the first two entries are also shown as 5,000,000.00 and 0.00 respectively.

MailUp Connector Section in Sitemap

The screenshot shows the Dynamics 365 Sales dashboard with the MailUp Connector section highlighted in the top navigation bar. The MailUp Connector section is located under the Settings tab and includes the following sub-sections:

- Configurations
- Personal Credentials
- MailUp Lists

The bottom section of the dashboard displays a funnel chart and a list of opportunities. The funnel chart shows three segments with values:

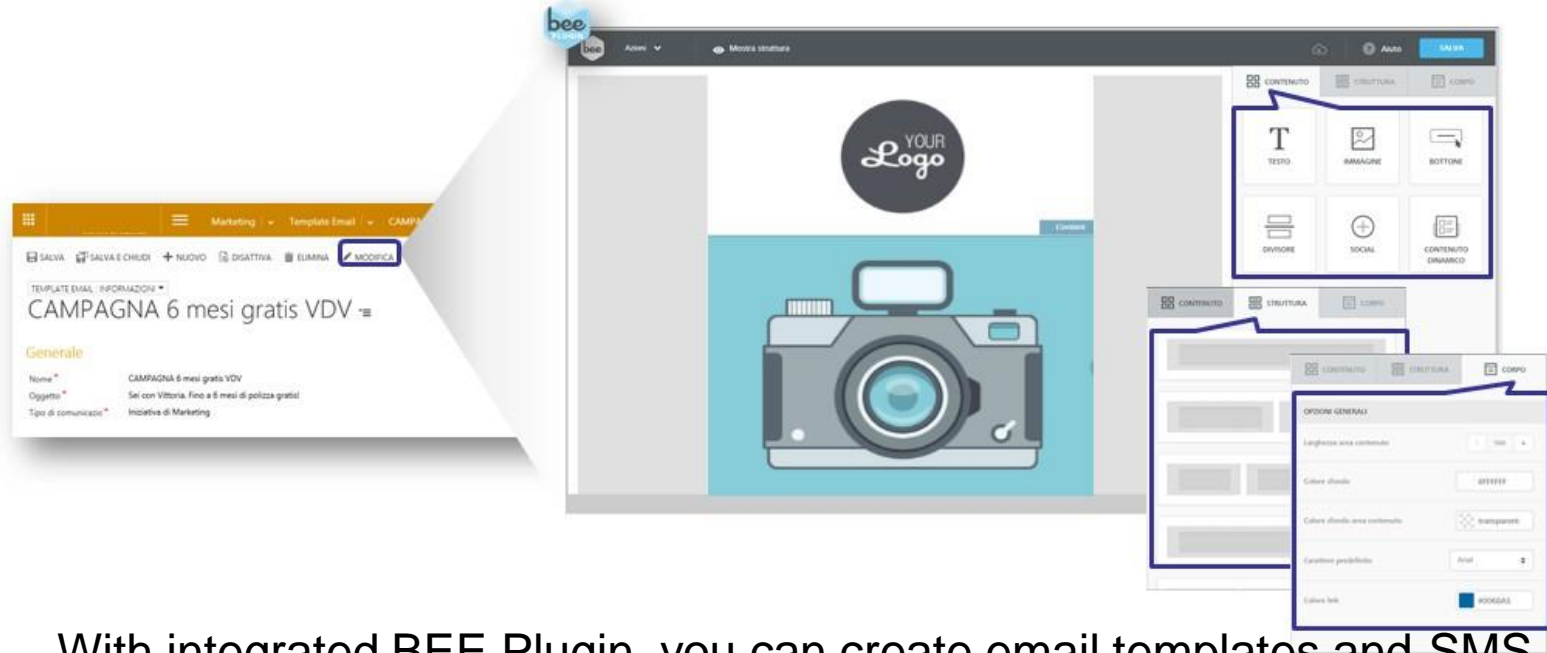
- Top segment: \$31,833,521.00
- Middle segment: \$35,200,883.04
- Bottom segment: \$29,861,364.00

The list of opportunities includes the following entries:

- 3D Printers for GDI**
Competitor: *Carter Electronics* added to Opportunity by MOD Administrator
On 3D Printers for GDI's wall
7/13/2017 3:52 AM
- Northwind Printers**
Competitor: *Carter Electronics* added to Opportunity by MOD Administrator
On Northwind Printers's wall
7/13/2017 3:52 AM
- Desktop and Laptop Upgrades**
Competitor: *Carter Electronics* added to Opportunity by MOD Administrator
On Desktop and Laptop Upgrades's wall
7/13/2017 3:52 AM



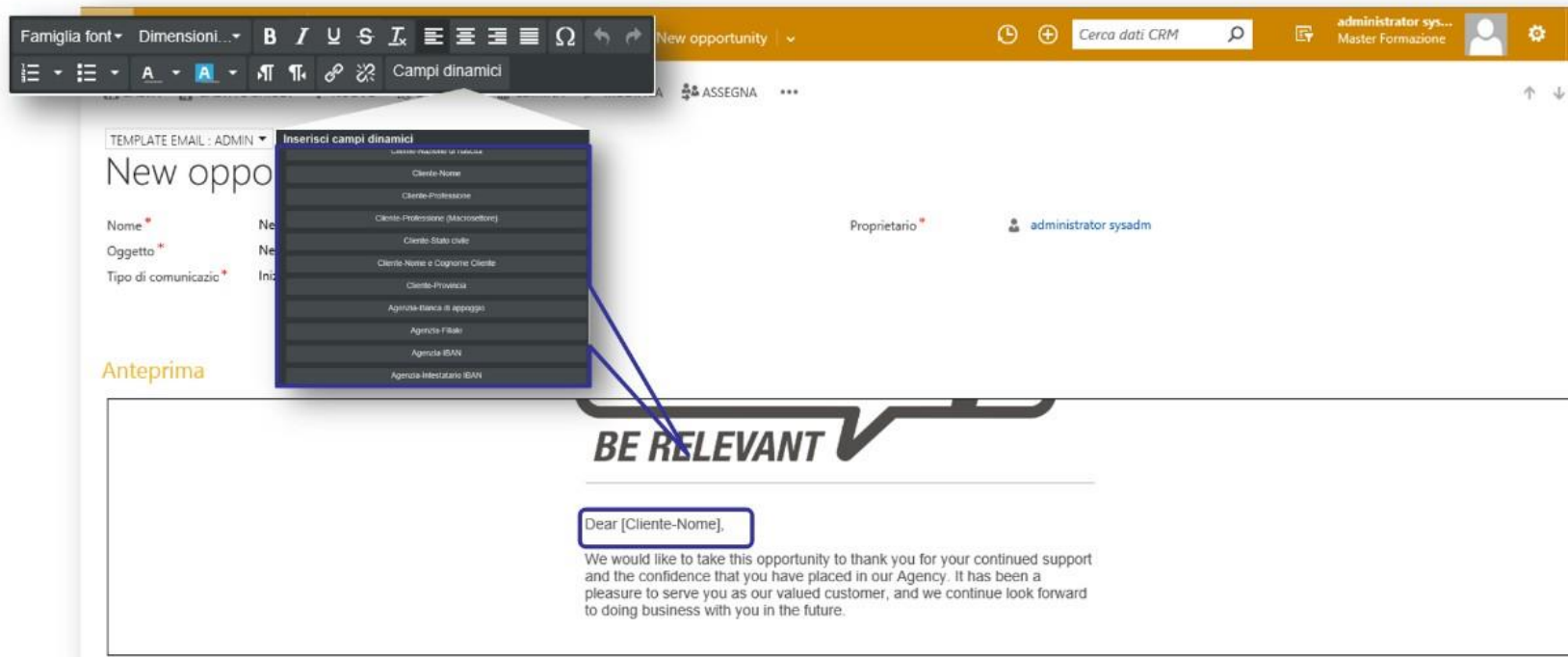
EMAIL + SMS TEMPLATE CONFIGURATION



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



DYNAMIC TAGS



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

Configura Iniziativa | Elaborazione Target (Attivo) | Completata

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	Preferito	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: Marketing Campaign
Proprietario: administrator system
Iniziativa: Marketing Campaign
Anagrafica: Johnson Jack
Messaggio: Errore

Invia Email MailUp: Invia
Motivo stato: Invia

HTML

Communication campaigns can be defined through:

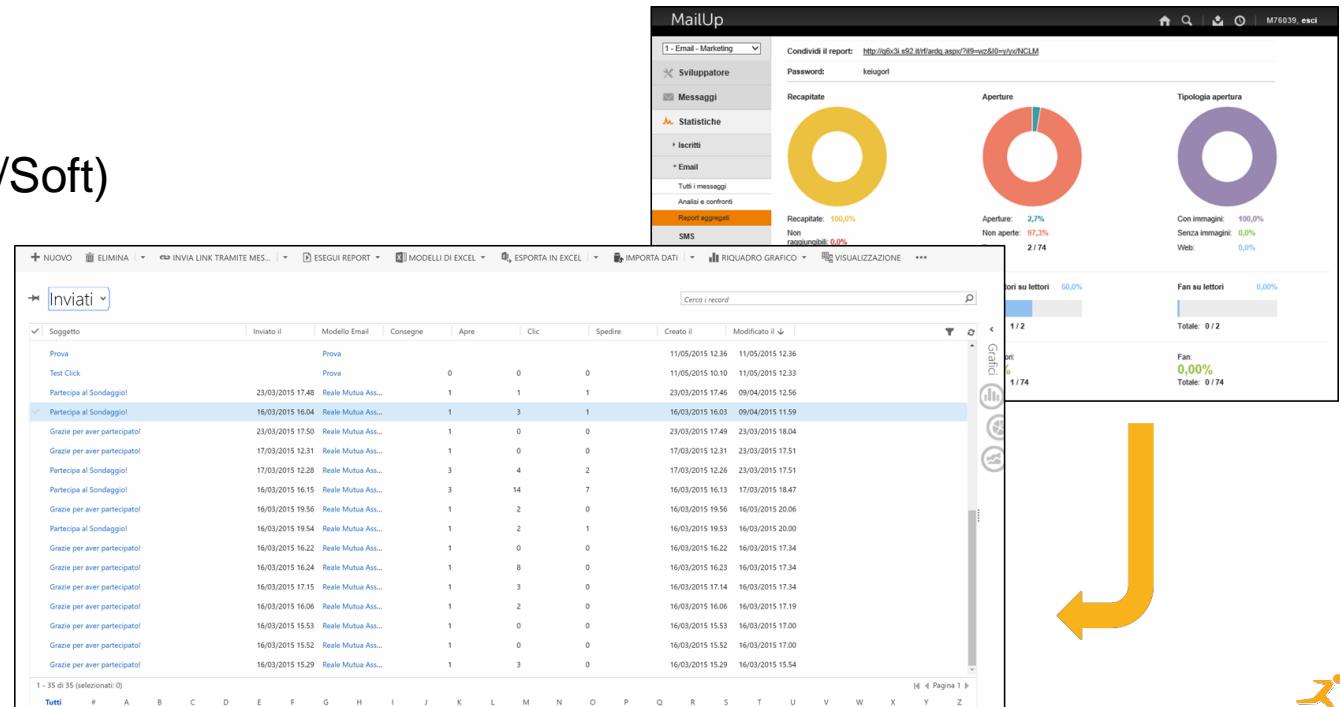
- Target
- Email Template and/or
- SMS Template



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 between Dynamics 365 and MailUp. A large yellow double-headed arrow points from the Dynamics 365 account page on the left to the MailUp recipient profile on the right.

Dynamics 365 Account Page (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 Console (Right):

- Recipient Profile:** a.vita@reply.it
- 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
- 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



VERSIONS & FEATURES

		Light FREE	Pro	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		✓	



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.



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



THANK YOU

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

