

# MailUp Plugin - Step-by-Step Manual

## MAILUP PLUGIN

Connect your CRM with your preferred mailing tool. Nothing is more powerful than linking your email services to a CRM, and this integration makes everything simpler, faster, and more efficient. The ultimate solution for:

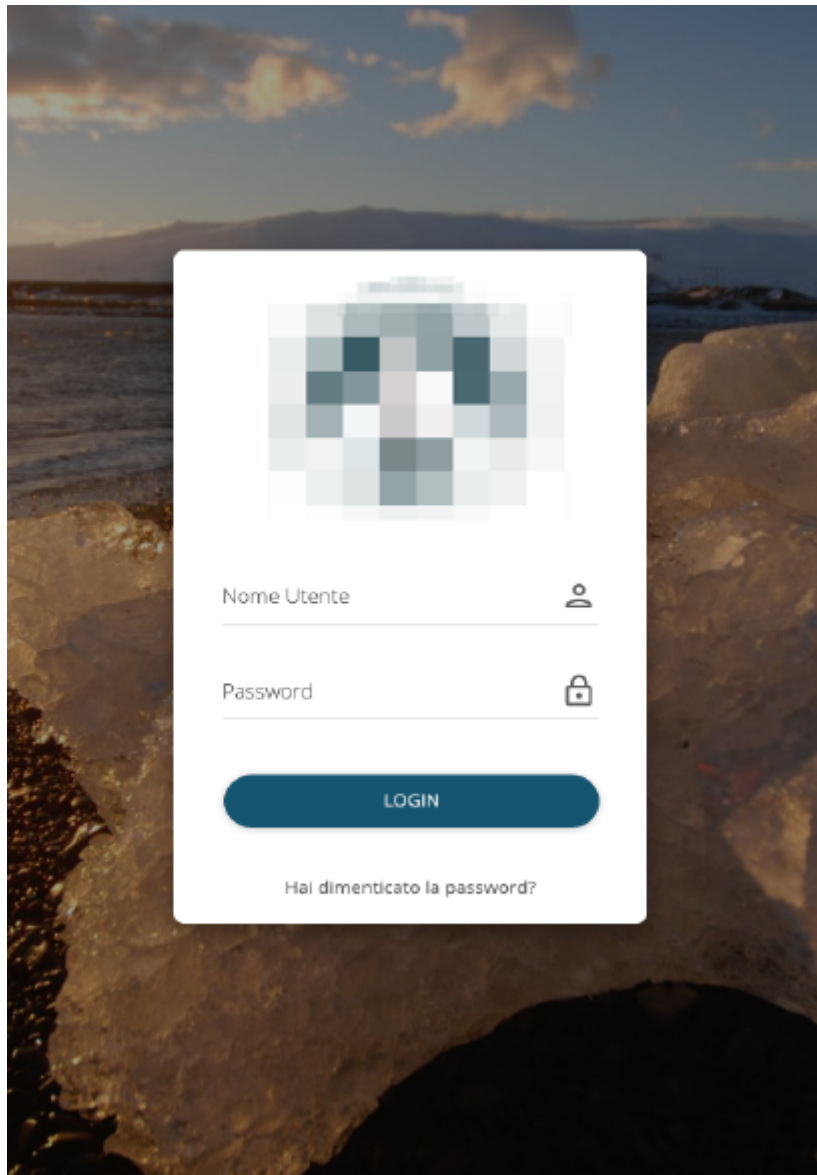
- Automatically synchronizing your CRM contacts with MailUp.
- Viewing MailUp email activity within your CRM.
- Integrating MailUp unsubscribes into your CRM.

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1. Creating targets from VTENEXT.
  2. Synchronizing targets with MailUp.
  3. Sending newsletters from MailUp.
  4. Managing unsubscribes.

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## LOGIN TO YOUR VTENEXT

Log in to your VTENEXT CRM by entering your username and password.



## CREATE A TARGET IN VTENEXT

A target consists of lists of names, a collection of companies, contacts, and/or leads (or even other targets) to whom you want to send the newsletter.

After logging in to VTENEXT, click the arrow to open the search bar and type "target." Click on **Target** to access the module.

At the top left, click **CREATE** to create a new target.



Enter the **Target Name** (mandatory) and define the target type. A dynamic target is used to synchronize the target with a report or filter.

There are two options (selectable by the user):

- **Incremental:** Adds names to the target based on the initial filter. It does not account for filter changes that exclude certain names.
- **Synchronized:** Updates by adding and removing names based on the filter.

The update occurs every 6 hours and also whenever the newsletter is sent.

The **Newsletter** module can manage duplicate email addresses, preventing repeated sends to the same address.

## SYNCHRONIZING TARGETS WITH MAILUP

To ensure that the target is synchronized and visible on MailUp, we need to check the “**MailUp Synchronization**” box and select the MailUp list where we want to add the target names to send the newsletter. Finally, click Save.

The screenshot shows the 'Creazione Target' (Target Creation) interface. The 'Informazioni Target' section includes fields for 'Nome Target', 'Numero Target' (set to 'AUTOGENERATO AL SALVATAGGIO'), 'Tipo Target' (set to '-- Nessuno --'), and 'Tipo sincronizzazione' (set to 'Incrementale'). The 'Informazioni MailUp' section has a checked 'Sincronia MailUp' checkbox and an empty 'ID Gruppo MailUp' field. A dropdown menu for 'Lista MailUp' is open, showing options: '--Prego Selezionare--', 'Cliente Italia', 'Cliente Germania', and 'VTE'. A green arrow points to the dropdown menu. At the top right, there are 'Salva' (Save) and 'Annulla' (Cancel) buttons. The top navigation bar includes a search bar and various utility icons.

The target synchronized with MailUp will automatically appear as a group in the selected list.

**Gruppi**  
Destinatari / Gruppi / Gruppi

ACQUISTA | [Icona] | [Icona] | [Icona]

NUOVO GRUPPO

Gruppi | Sovrapposizione gruppi | Verifica gruppi e filtri | Cerca / gestisci email | Cerca / gestisci SMS

Cerca per nome o nota | Tutti i gruppi | RIPRISTINA | CERCA

Seleziona tutti

ID	NOME GRUPPO	ISCRITTI EMAIL	DISISCRITTI EMAIL	SOSPESI EMAIL	ISCRITTI SMS	DISISCRITTI SMS	AZIONI
73	TRG-29 - Cliente ES	1	0	0	0	0	[Icona]
71	TRG-28 - Cliente BE	6	0	0	0	0	[Icona]
70	TRG-27 - Cliente FR	1	0	0	0	0	[Icona]
69	TRG-21 - Cliente IT	16	0	0	1	0	[Icona]
68	TRG-25 - Cliente SI	4	0	0	0	0	[Icona]

Cerca...

LISTA

+ Crea | i Altro

Visualizzando da 1 a 5 di 5

Abone	Numero Target	Nome Target	Tipo Target	Sincronia MailUp	Lista MailUp	ID Gruppo MailUp	Assegnato a
<input type="checkbox"/>	29,28,27,21,25						
<input type="checkbox"/>	TRG-21	Cliente IT	Dinamico	si	VTE	69	comunicazione (Mario Ross)
<input type="checkbox"/>	TRG-27	Cliente FR	Dinamico	si	VTE	70	comunicazione (Mario Ross)
<input type="checkbox"/>	TRG-28	Cliente BE	Dinamico	si	VTE	71	comunicazione (Mario Ross)
<input type="checkbox"/>	TRG-25	Cliente SI	Dinamico	si	VTE	68	comunicazione (Mario Ross)
<input type="checkbox"/>	TRG-29	Cliente ES	Dinamico	si	VTE	73	comunicazione (Mario Ross)

Visualizzando da 1 a 5 di 5

## DATA SYNCHRONIZATION OF SENDINGS

Once the newsletter is sent from MailUp, the newsletter will automatically be created in vtenext as well.

Cerca...

Newsletter 138 - Iscriviti al nostro corso!

Modifica | [Icona] | [Icona] | [Icona]

INFORMAZIONI | STATISTICHE | GRAFICO PROCESSO | STORICO PROCESSO | STORICO

**Informazioni Newsletter**

Nome Newsletter: 138 - Iscriviti al nostro corso!

Numero Newsletter: NWS-157

Campagna: 138 - Iscriviti al nostro corso!

Data: 03-05-2024

Nome Mittente: MailUp

Indirizzo Mittente:

**Informazioni MailUp**

Lista MailUp: VTE

ID Messaggio MailUp: 138

**Anteprima Template**

Nome: Iscriviti al nostro corso!

Descrizione:

Cartella: Public

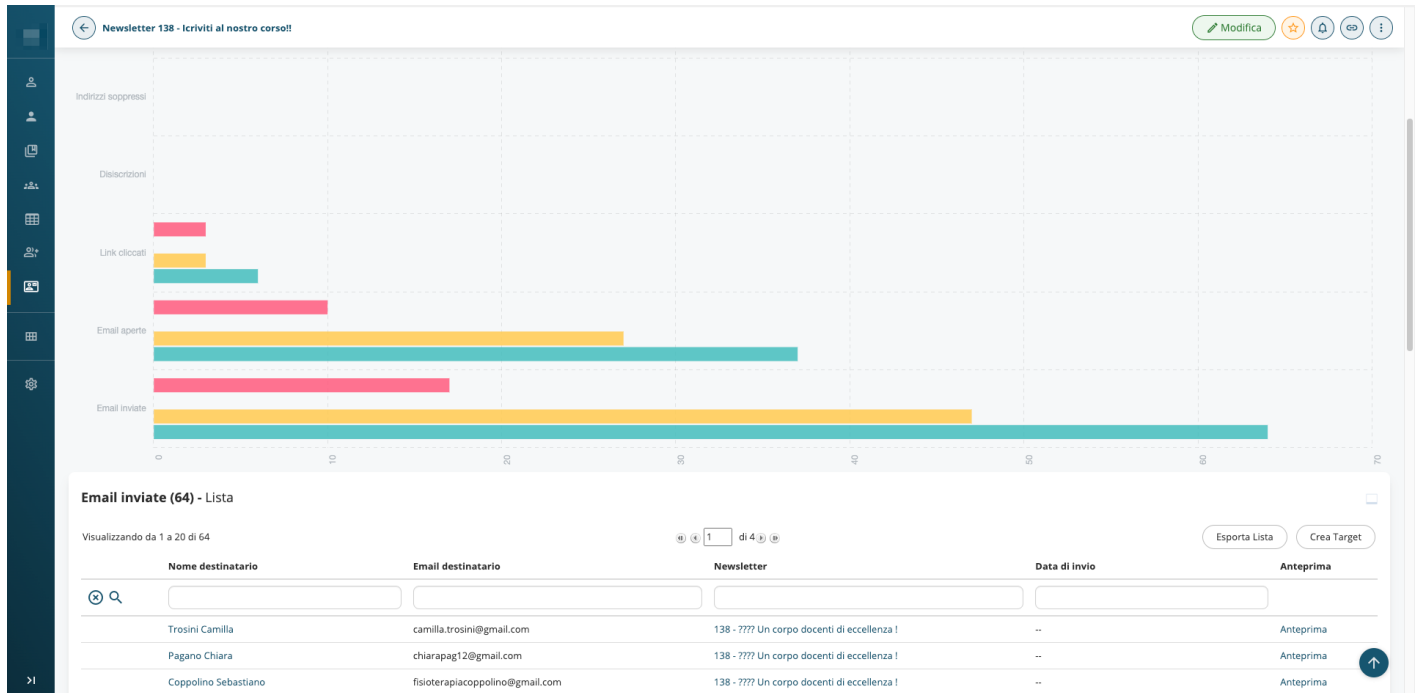
Tipo: Newsletter

Oggetto: Iscriviti al nostro corso!

Messaggio:

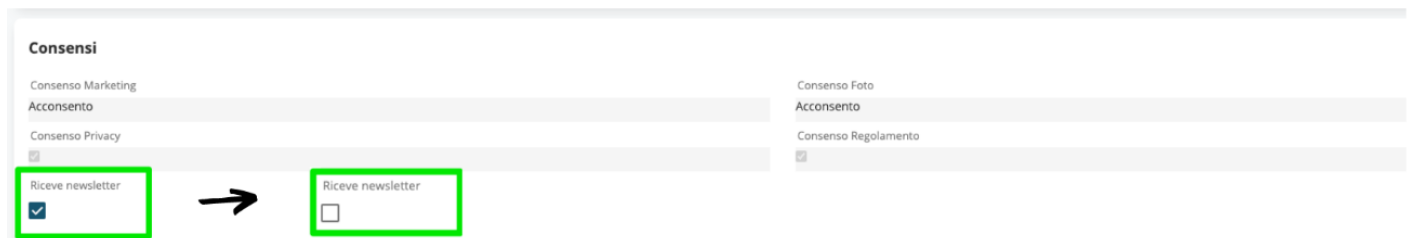
[Preview of email content: A group of people sitting around a table in a classroom setting.]

The sending statistics are also synchronized automatically. By clicking on the **TAB > STATISTICS**, you can view the sending data.



## UNSUBSCRIBE INTEGRATION

When a lead, contact, or company unsubscribes from the "Receives Newsletter" field, the checkbox will be unchecked, and the name will be marked as unsubscribed.



When a lead, contact, or company unsubscribes from the "Receives Newsletter" field, the checkbox will be removed, and the name will be unsubscribed.

Revision #5

Created 2024-12-19 10:06:48 UTC

Updated 2025-09-22 13:25:45 UTC by Admin