

# MailUp Plugin - Step-by-Step Manual

## MAILUP PLUGIN

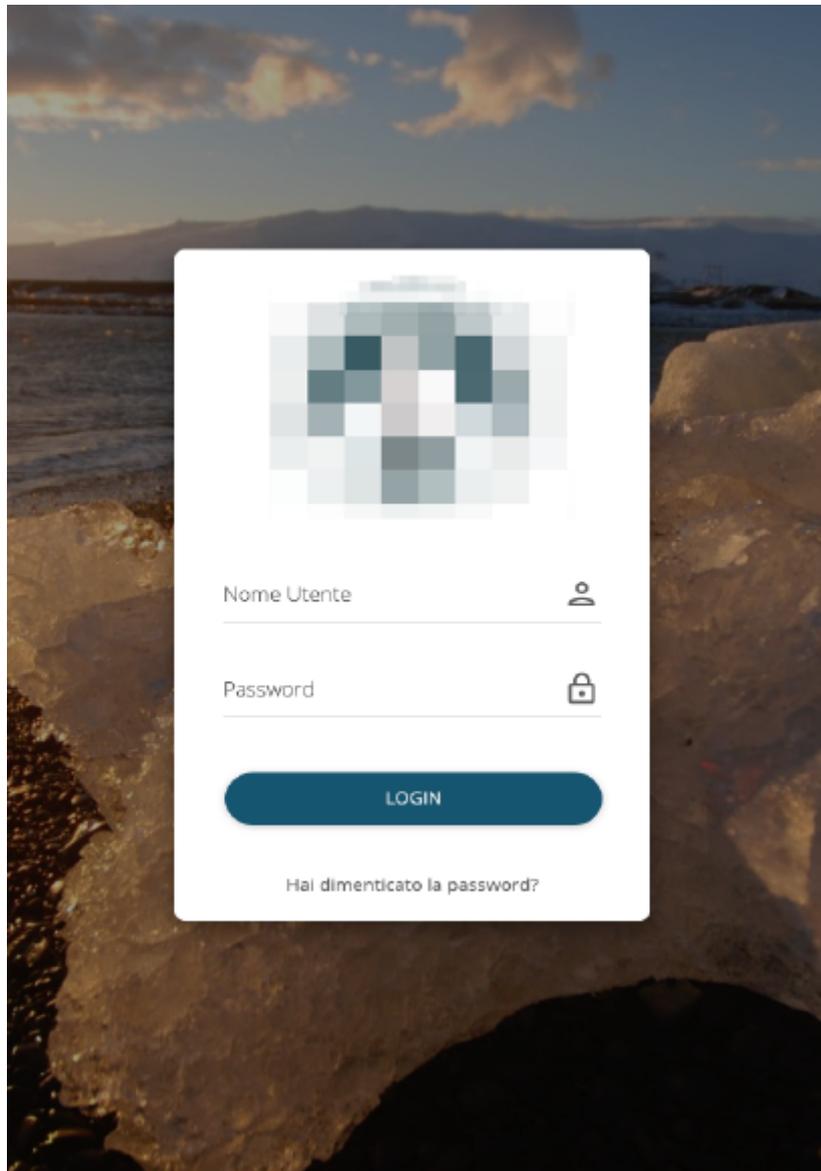
Connect your CRM with your preferred mailing tool. Nothing is more powerful than linking your email services to a CRM, and this integration makes everything simpler, faster, and more efficient. The ultimate solution for:

- 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.

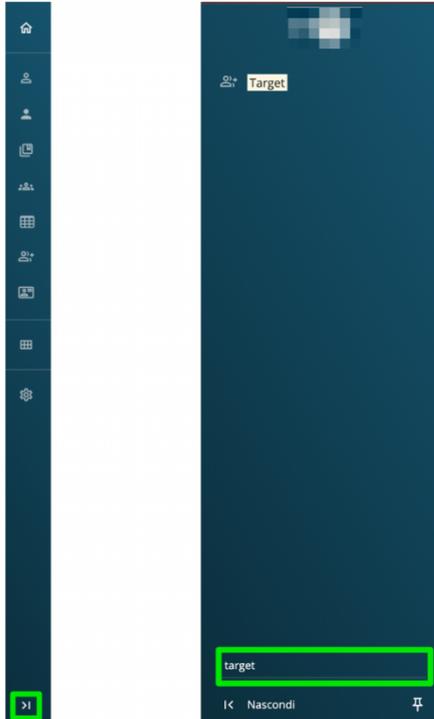


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## CREATE A TARGET IN VTENEXT

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.

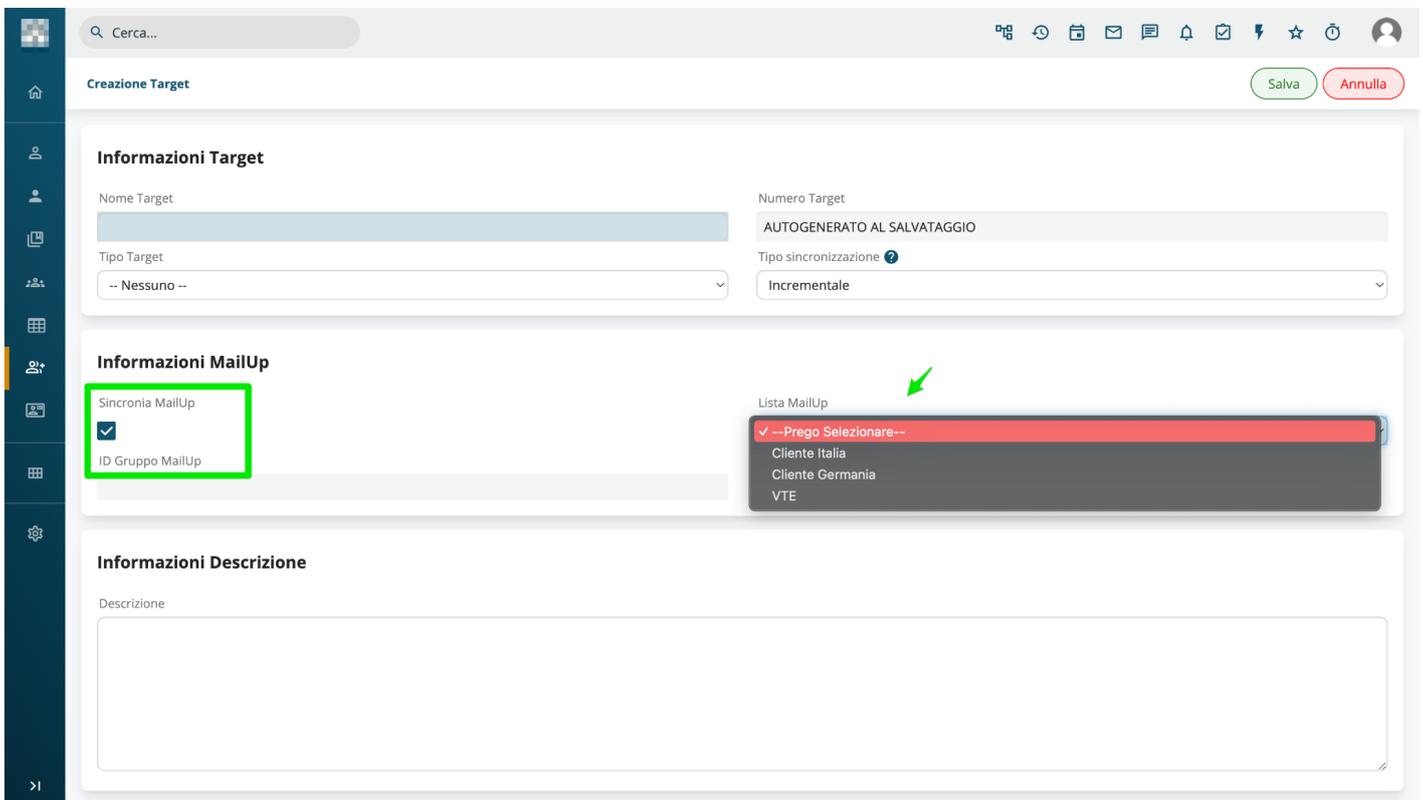
The update occurs every 6 hours and also whenever the newsletter is sent.

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

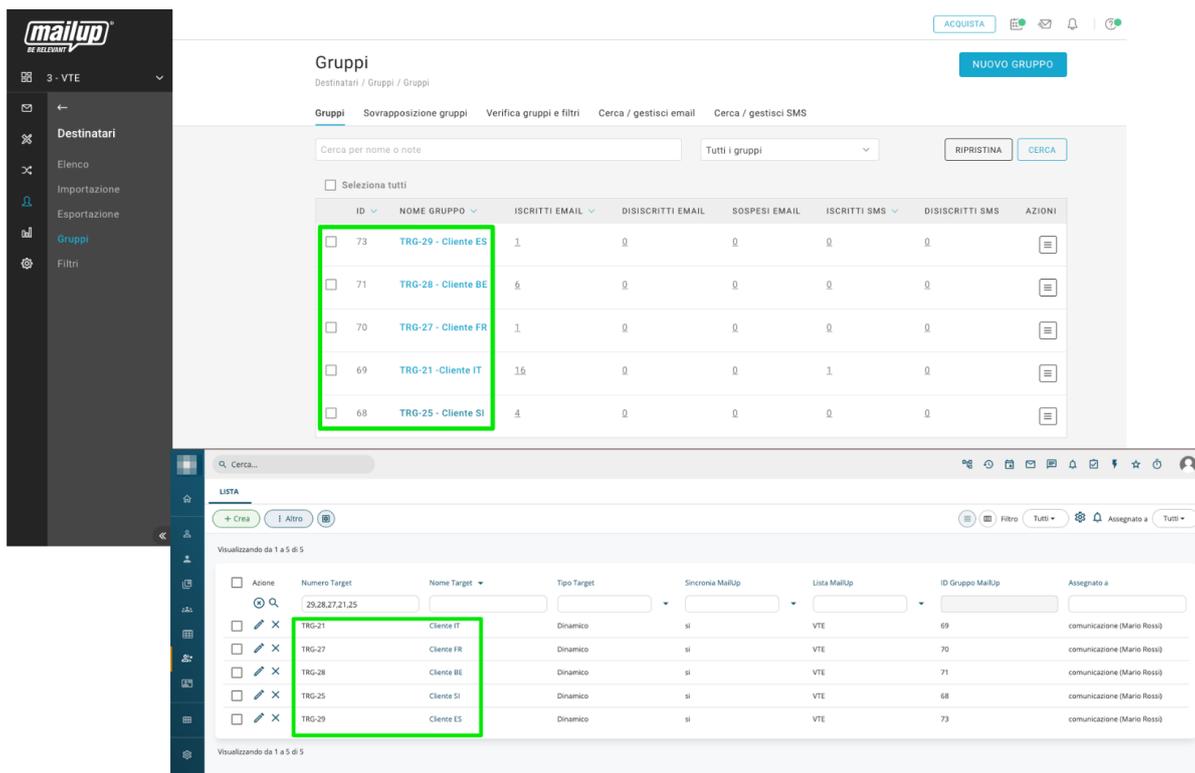
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## SYNCHRONIZING TARGETS WITH MAILUP

To synchronize the target and make it visible on MailUp, check the **MailUp Sync** option and select the MailUp list where you want to add the target names for the newsletter. Finally, click **Save**.



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



## SYNCHRONIZING SENDING DATA

Once the newsletter is sent from MailUp, the newsletter will also automatically be created in VTENEXT.

The screenshot shows the MailUp interface for a newsletter titled "Newsletter 138 - Iscriviti al nostro corso!". The interface is divided into several sections:

- Informazioni Newsletter:** Displays details such as "Nome Newsletter" (138 - Iscriviti al nostro corso!), "Numero Newsletter" (NWS-157), "Data" (03-05-2024), and "Indirizzo Mittente" (MailUp).
- Informazioni MailUp:** Shows "Lista MailUp" (VTE) and "ID Messaggio MailUp" (138).
- Anteprima Template:** Provides a preview of the email template with fields for "Nome", "Descrizione", "Cartella", "Tipo", "Oggetto", and "Messaggio". The preview shows a yellow background with an illustration of a classroom.

On the right side, there are sections for "SCORCIATOIE" (Conversazioni) and "RELAZIONI" (Processi).

Sending statistics are also synchronized automatically. Click on the **TAB > STATISTICS** to view the sending data.

The screenshot shows the MailUp interface displaying sending statistics and a list of sent emails. The statistics section includes a horizontal bar chart with the following data:

Category	Value
Indirizzi soppressi	0
Disiscrizioni	0
Link cliccati	~5
Email aperti	~20
Email inviati	~64

Below the chart, there is a section titled "Email inviate (64) - Lista" showing a list of sent emails. The list includes columns for "Nome destinatario", "Email destinatario", "Newsletter", "Data di invio", and "Anteprima".

Nome destinatario	Email destinatario	Newsletter	Data di invio	Anteprima
Trosini Camilla	camilla.trosini@gmail.com	138 - ???? Un corpo docenti di eccellenza !	--	Anteprima
Pagano Chiara	chiarapag12@gmail.com	138 - ???? Un corpo docenti di eccellenza !	--	Anteprima
Coppolino Sebastiano	fisioterapiacoppolino@gmail.com	138 - ???? Un corpo docenti di eccellenza !	--	Anteprima

## UNSUBSCRIBE INTEGRATION

When an unsubscribe occurs, the **Receives Newsletter** field for leads, contacts, and companies will be unchecked, and the unsubscribed name will be updated accordingly.



The image shows a consent form titled "Consensi". It is divided into two columns. The left column contains "Consenso Marketing Accenso" and "Consenso Privacy" with a checked checkbox. The right column contains "Consenso Foto Accenso" and "Consenso Regolamento" with a checked checkbox. Below these, there are two "Riceve newsletter" fields, each with a checkbox. The first field has a checked checkbox, and the second field has an unchecked checkbox. An arrow points from the first field to the second, indicating a transition from a subscribed state to an unsubscribed state.

When a lead, contact, or company unsubscribes, the checkmark in the **Receives Newsletter** field will be removed, and the name will be marked as unsubscribed. ■ ■

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