

Inxmail Professional for Microsoft Dynamics CRM 2011

User Manual



Version MSCRM-A-EN-13-2.1

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Table of contents

| | | |
|----------|--|-----------|
| 1 | Inxmail Professional for Microsoft Dynamics CRM | 2 |
| 2 | Campaign activity | 3 |
| 2.1 | Creating an Inxmail Professional campaign activity | 3 |
| 2.2 | Target marketing lists | 5 |
| 2.3 | Transferring recipients | 5 |
| 3 | Mailing | 6 |
| 3.1 | Mailing list and recipients | 6 |
| 3.2 | Creating a new mailing..... | 8 |
| 3.3 | Sending the mailing..... | 10 |
| 4 | Return transfer: Reactions and reports | 12 |
| 4.1 | Email activities | 12 |
| 4.2 | Bounces | 13 |
| 4.3 | Unsubscriptions..... | 13 |
| 4.4 | Campaign reactions | 14 |
| 4.5 | Inxmail Professional report | 15 |
| 4.6 | New leads | 16 |
| 5 | Error handling | 17 |
| 6 | Index | 18 |

About this document

Release

This document relates to the following releases/versions:

- Inxmail Professional 4.3
- Microsoft Dynamics CRM 2011

Integration version: 1.0.9.0

Target group

This document is intended for users who use Inxmail Professional as an integrated solution for Microsoft Dynamics CRM 2011.

Additional Information and documents

For a detailed description of the functionality of Inxmail Professional, see the Inxmail Professional User Manual and online help. The User Manual is supplied with Inxmail Professional as a PDF document. It is also available for download from the *Inxmail Community* at <http://community.inxmail.de/wdefault/wlogin/index.php>.

The Inxmail Community offers a range of other documents for Inxmail Professional users including how tos and documents for administrators, for example, installation manuals.

Typographic conventions

| Formatting | Use |
|------------|-----|
|------------|-----|

| | |
|-----------------------|---|
| <i>User interface</i> | <i>Words formatted in italics relate to elements of the Inxmail Professional user interface</i> |
|-----------------------|---|

| | |
|------|--|
| Code | Text formatted in this style represents program code |
|------|--|

1 Inxmail Professional for Microsoft Dynamics CRM

The Inxmail Professional for Microsoft Dynamics CRM 2011 Connector expands the functionality of Microsoft Dynamics CRM 2011 by adding a facility to implement professional email marketing campaigns.

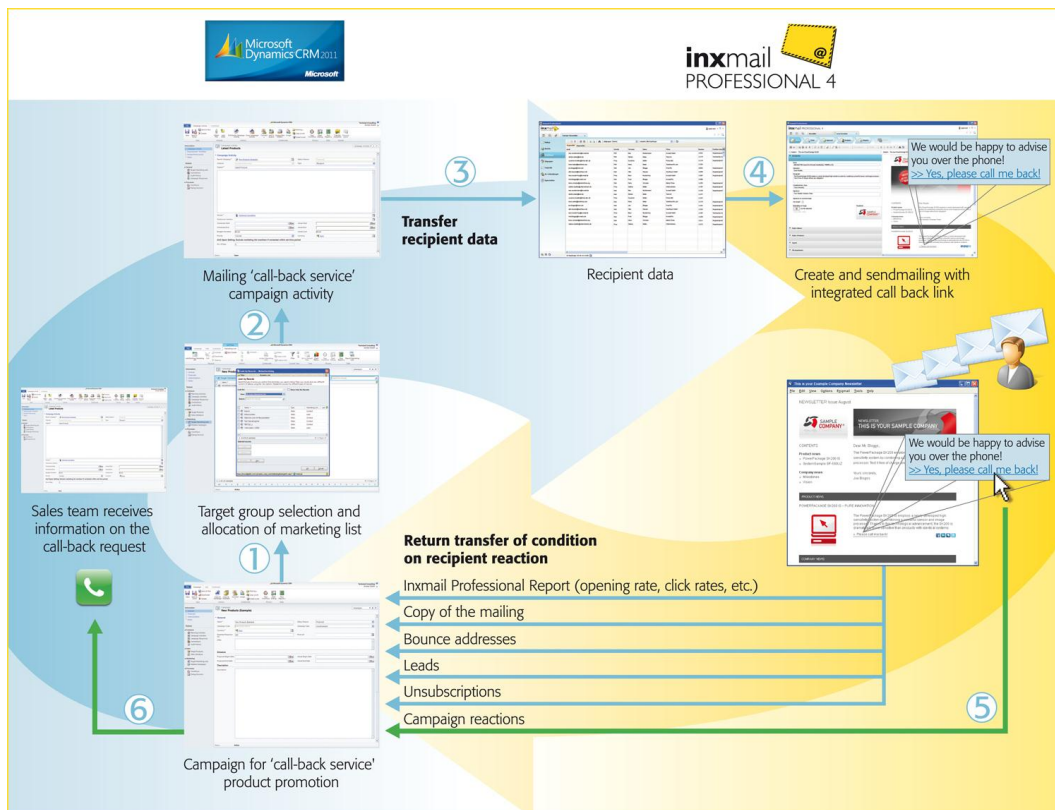


Fig. 1: Inxmail Professional for Microsoft Dynamics 2011

You can create your campaign activity as usual in Microsoft Dynamics CRM 2011. While doing so, simply fill out the appropriate additional Inxmail Professional fields. Then start the recipient transfer (that is, the transfer of your contacts and leads) to Inxmail Professional.

The campaign activity is created as a mailing list in Inxmail Professional. The recipient data can be found in the recipient list of this mailing list.

You can create your mailing (newsletter) in Inxmail Professional and send it to the recipients.

You can specify that the following should automatically be transferred back to Microsoft Dynamics CRM 2011 after the mailing is sent:

- A corresponding email activity is created in Microsoft Dynamics CRM 2011 for each recipient who received the mailing. In addition to the mailing subject, this can also contain the (impersonal) sent mailing.
- The recipient reactions are saved to the mailing in Microsoft Dynamics CRM 2011 for each recipient (for example, the recipient's click and opening rate, bounce address or unsubscription).


You can also bring up a report on the key figures of the sent mailing directly in Microsoft Dynamics CRM 2011.

2 Campaign activity

To be able to send a mailing (newsletter) with Inxmail Professional, you must first create a campaign activity with the 'Inxmail Professional' channel in Microsoft Dynamics CRM 2011. This will automatically create a mailing list in Inxmail Professional.

Next, assign one or more target marketing lists to this campaign activity to specify the recipients (that is, contacts and leads) to which the mailing is sent. Start the transfer of the recipient data to Inxmail Professional manually.

2.1 Creating an Inxmail Professional campaign activity

1. Select *Marketing > Campaigns* in Microsoft Dynamics CRM 2011 to open your campaign and select your campaign in the list.
The campaign opens in a new window.
2. In the campaign, go to *Related > General* and click *Campaign activities*. Then click the  *Add new campaign activity* button.

A window appears.

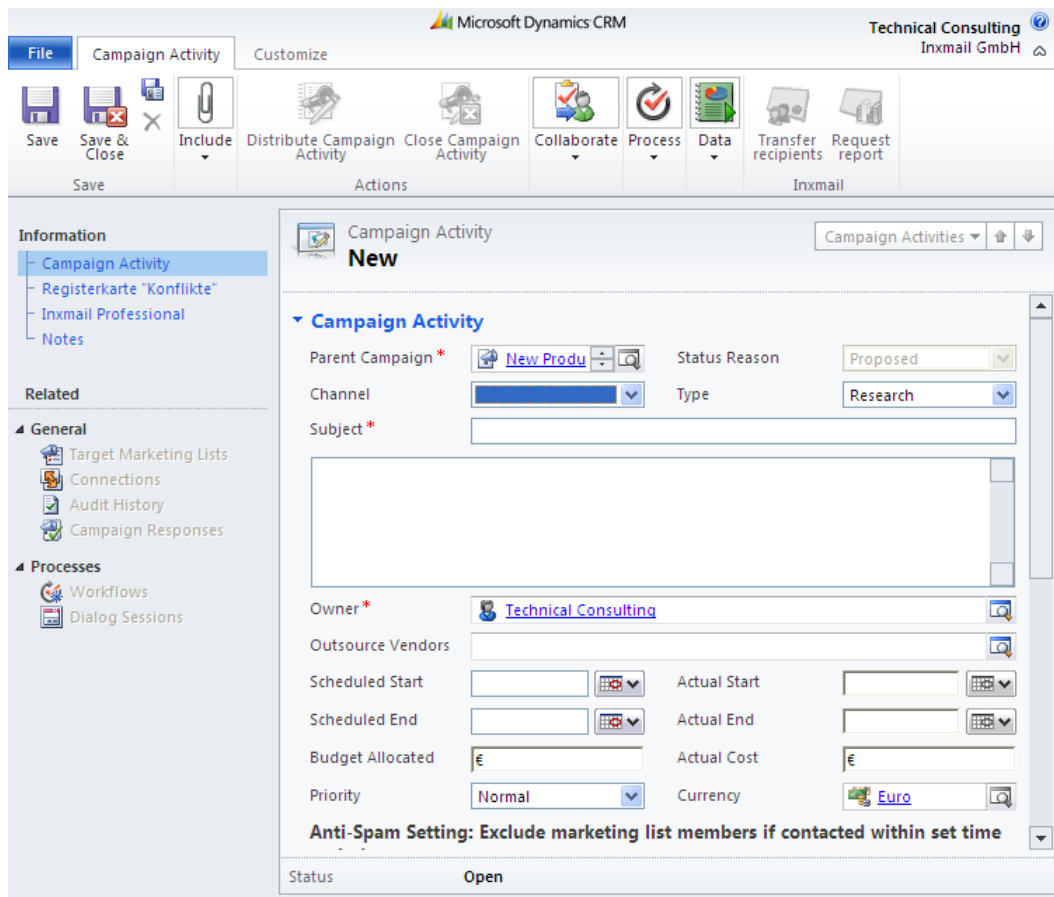


Fig. 2: Add new campaign activity

3. Specify the following in the *Campaign activity* area:
 - a. Select the 'Inxmail Professional' channel.
 - b. Enter a meaningful name for the campaign activity in the *Subject* field.

Microsoft Dynamics CRM 2011 automatically applies the subject as the name of the mailing list.

4. Specify the following in the *Inxmail Professional* area:

- a. Specify the name under which the mailing list will be created in Inxmail Professional in the *List name* field. This field is already prefilled with the subject name of the campaign activity. You can change this name.

If you specify a name of an existing mailing list used for a campaign activity in Inxmail Professional, the system will correct the mailing list name you entered in the *List name* field.

- b. Specify the sender email address to be used for the mailing.
- c. Specify the email address to which any replies to the mailing should be sent.
- d. Use the *Create email activity* drop-down list to select if the mailing should be saved as email activity in Microsoft Dynamics CRM 2011 (see *Email activities*, page 12).

You can select from the following options:

- *None*: The mailing is not saved as email activity.
 - *Subject*: The subject of the campaign activity is saved as the email activity for each recipient to which the mailing is sent.
 - *Complete*: The subject of the campaign activity is saved as the email activity for each recipient to which the mailing is sent. The sent mailing is also saved. However, only the impersonal form of the mailing is saved (for example, instead of the personalised form of address, only 'Dear Reader' will be saved).
- e. Select when a campaign reaction should be created from the *Create campaign reactions* drop-down list (see *Email activities*, page 12).

You can select from the following options:

- *On clicks*: A campaign reaction is created if the recipient clicks a link in the mailing.
 - *Clicks and openings*: A campaign reaction is created if the recipient opens the mailing or clicks a link in the mailing.
- f. Under *Generate leads*, select if you want to use the campaign activity to generate new leads when recipients subscribe to the Inxmail Professional mailing list (see *New leads*, page 16).

Note We recommend creating a separate campaign activity used only for this purpose when generating leads. The campaign activity should not be additionally used to send a mailing.

The fields under *Sending information* cannot be edited. These fields are filled automatically as soon as you have sent the mailing in Inxmail Professional (see *Sending the mailing*, page 10).

When this occurs, the following information will be visible in this area:

- *Mailing status*: This field shows whether the mailing was sent in Inxmail Professional.
- *Soft bounces*: This field shows if soft bounces occurred.
A soft bounce occurs if the mailing list could not be sent to a recipient due to a temporary error (for example, because the target mail server could not be reached due to a recipient's full email inbox). The email is delivered to the recipient as soon as the temporary error has been rectified.
- *Hard bounces*: This field shows if hard bounces occurred.
A hard bounce occurs if the mailing could not be sent to a recipient due to a permanent error (for example, due to an incorrect email address or deleted email account).
- *Unknown bounces*: This field shows if unknown bounces occurred.
The 'Unknown bounce' category is used by Inxmail Professional for all bounces that cannot be assigned to any other category.

5. Save your settings.

You have created and configured a campaign activity. A corresponding mailing list has also automatically been created in Inxmail Professional.

2.2 Target marketing lists

Ensure that the target marketing lists containing all contacts and leads to which the mailing is to be sent are assigned to the campaign activity.


You can assign both static and dynamic target marketing lists for campaign activities with the 'Inxmail Professional' channel.

For more information on creating and using target marketing lists, see the Microsoft Dynamics CRM 2011 Online Help system.

2.3 Transferring recipients

Setting up the campaign activity also automatically creates a mailing list in Inxmail Professional. However, the mailing list does not yet contain any recipient data.

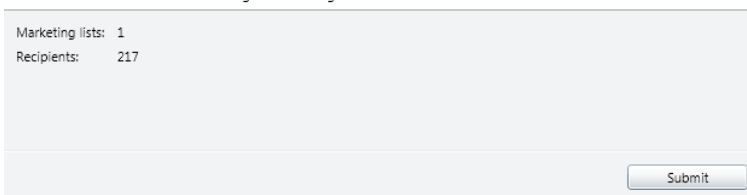
The next step is to transfer the contacts and leads assigned to the campaign activity through target marketing lists to Inxmail Professional as recipients as follows:

1. Open your Inxmail Professional campaign activity
2. Click the  *Transfer recipients* button.

The system determines how many target marketing lists are related to the campaign activity and how many recipients can be transferred.

Submit Recipients

Submit all contacts and leads in the assigned marketing lists to Inxmail Professional



| | |
|------------------|-----|
| Marketing lists: | 1 |
| Recipients: | 217 |

Submit

Fig. 3: Transfer recipients

3. Click the *Transfer* button.

All contacts and leads in the target marketing lists are transferred. They are automatically subscribed to the Inxmail Professional mailing list as recipients.

If data from already transferred contacts or leads (for example, the surname or address) is modified, the corresponding recipient data will be promptly and automatically updated in Inxmail Professional.

The following are **not** automatically compared between Microsoft Dynamics CRM 2011 and Inxmail Professional:

- New contacts that were created after the transfer to Microsoft Dynamics CRM 2011 will not be automatically transferred to Inxmail Professional.
- Contacts that were deleted after the transfer to Microsoft Dynamics CRM 2011 will not be automatically unsubscribed or deleted in Inxmail Professional.

For this reason, you should run the recipient transfer again shortly before sending the mailing (see *Sending the mailing*, page 10). Already transferred data will then be overwritten.

3 Mailing

In Inxmail Professional, you can open the mailing list created automatically by your campaign activity and check if all recipients (that is, contacts and leads) were transferred.

You can then create a new mailing in the mailing list and fill it with content. Then assign the mailing to the recipients and send it.

We recommend never sending more than **one** mailing to a mailing list created by a campaign activity (see *Creating an Inxmail Professional campaign activity*, page 3)



The reason for this is that if you send two mailings, for example, it will have the following effect on the handling of the recipient reactions:

- After sending the first mailing, the clicks and openings of this first mailing are counted and displayed in Microsoft Dynamics CRM 2011 as usual.
- If a second mailing is then sent,
 - only clicks and openings of the second mailing will be counted (that is, from this point on, no clicks and openings of the first mailing will be counted any longer).
 - The clicks and any openings of the second mailing will be added to the clicks and openings of the first mailing counted up to this point.

If you want to send further mailings, you should create a new campaign activity and thereby automatically create an additional mailing list.

3.1 Mailing list and recipients

Creating the Inxmail Professional campaign activity also automatically creates a mailing list in Inxmail Professional (see *Creating an Inxmail Professional campaign activity*, page 3). This mailing list can be opened as follows:

1. Start Inxmail Professional and log in with your login data.
2. Click the  *List overview* entry in the main tab  (*Cockpit*).

You will be directed to the overview of mailing lists. An overview of all mailing lists to which you have access appears.

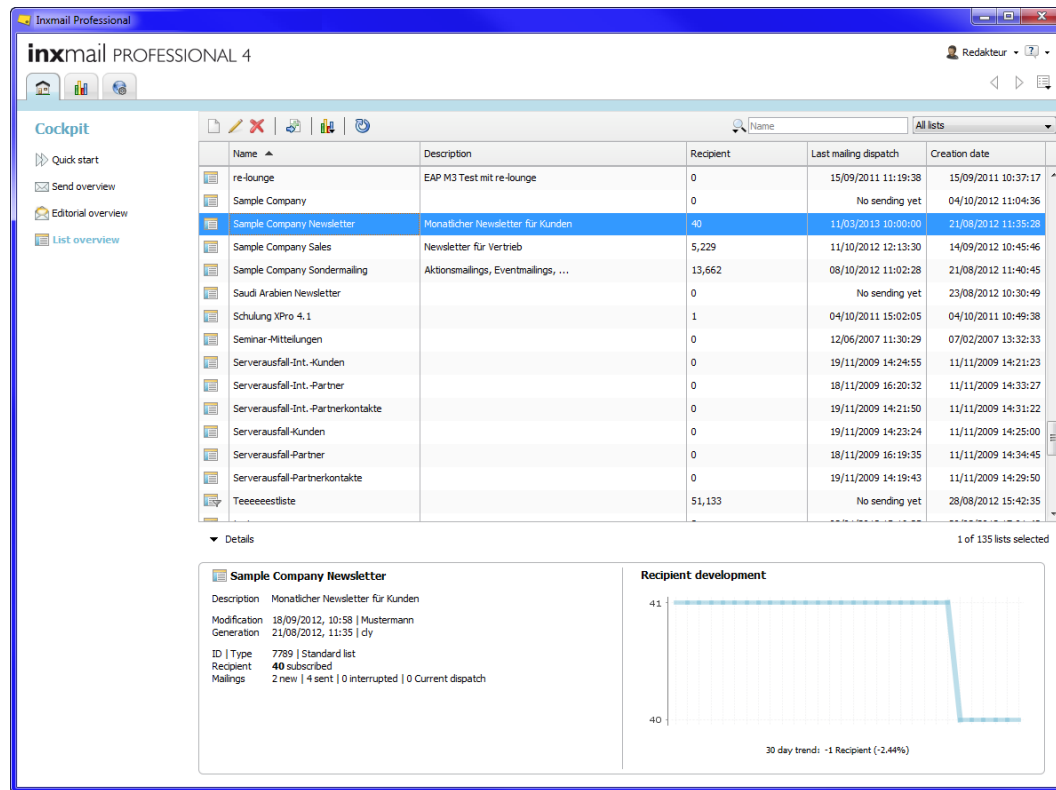



Fig. 4: Cockpit – List overview


- Double-click the mailing list name in the overview to open the mailing list. The mailing list will appear on its own tab.



Fig. 5: 'Company Newsletter' mailing list tab

The  **Properties** agent of the mailing list contains the reply and sender email address details, for example (see *Creating an Inxmail Professional campaign activity*, page 3).

You can check if the recipient transfer was successful, that is, if the contacts and leads were subscribed to the mailing list (Transferring recipients, page 5) as follows:

- On the tab of the mailing list, click the  **Recipients** agent > **Subscribed** tab.

All recipients subscribed to the mailing list appear.

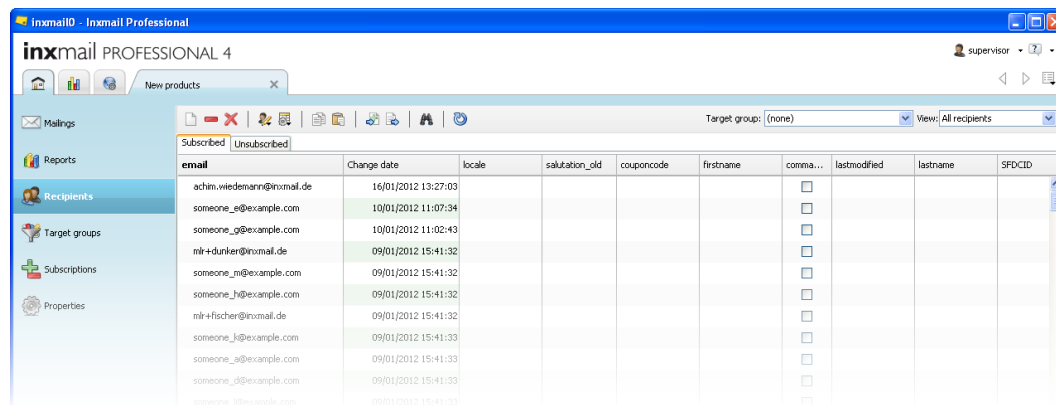






Fig. 6: 'Recipients' agent > 'Subscribed' tab

3.2 Creating a new mailing

1. Open the mailing list created automatically by the Inxmail Professional campaign activity (see Mailing list and recipients, page 6).
2. You can open the *Create new mailing* dialog box as follows:
 - To open the dialog box on the  (Cockpit) tab, go to the tab and then click the  New mailing button.
 - To open the dialog box on the tab of a mailing list, go to the  Mailings agent > Mailings tab and click the  (Create new mailing) button.

The dialog box opens.

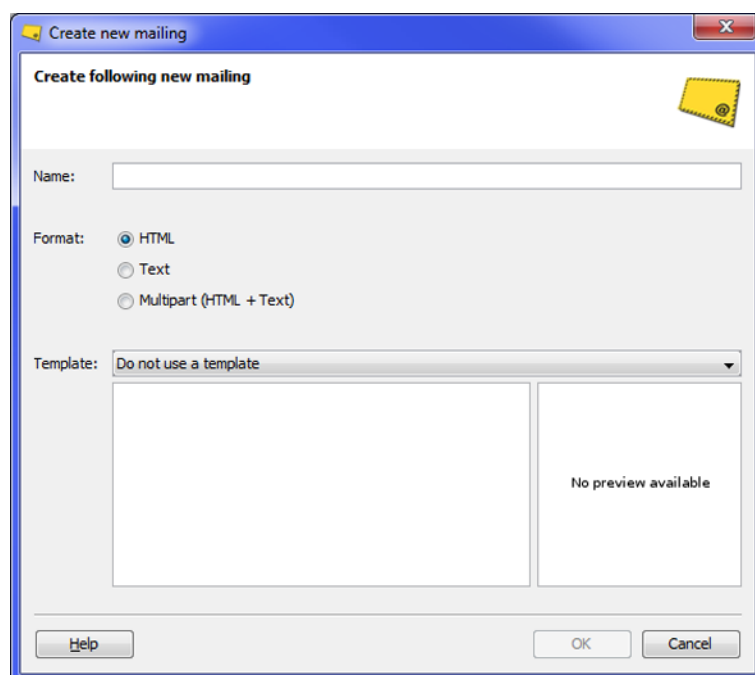


Fig. 7: (from the tab of an open mailing list) 'Create new mailing' dialog box

3. If you opened the dialog box from the Cockpit tab, select the mailing type in the *Type* drop-down list and the mailing list in which you want to create your mailing from the *Associated list* drop-down list in the dialog box.

If you opened the dialog box from the tab of a mailing list, the *Associated list* field will not be displayed in the dialog box as the mailing will be automatically created for the current mailing list.

4. Enter a name for the mailing in the dialog box.

Select a name that will allow you to locate the mailing quickly.

5. Select one of the following formats for the mailing:

If the format is already preselected and the respective fields in the dialog box are greyed out, this means that the format for all mailings of this mailing list is preset (Setting up the properties of mailing lists).

- Text

Mailings in text format can be read by every recipient without any problems and are therefore the preferred format for emails. However, if you opt for text format, you can only send your images as file attachments.

- HTML

Mailings in HTML format may contain images, different fonts and colours. You can either save your images on a Web server so that the images are loaded from the Web server and integrated into your mailing when your mailing is accessed. Or, you can embed your images in your mailing directly, so that your recipients may view the images even when offline.

Note To create mailings in HTML format, you will need to be familiar with the HTML mark-up language. For security reasons, the following HTML elements are not allowed in mailings:

- ActiveX
- Audio
- External style sheets
- Frames and iframes
- Java
- The 'meta refresh' element
- Scripts (JavaScript, VBScript, Perl etc.)
- Tooltips
- Video

Please note that many email programs will not display HTML forms.

- Mailings in multipart format contain both a plain text version and an HTML version of the prepared mailing. The recipient's email program can then independently select which of the two versions to display.

6. Select one of the following options from the *Template* drop-down list:

- To create an empty mailing that is not based on a mailing template, select the *Do not use a template* entry.
- To create a mailing whose layout or contents are predetermined by a user-template created in Inxmail Professional (Setting up a user template (text, HTML, multipart)), select the *Use user-templates* entry. Then select the user-template you require in the section under the drop-down list.

- To create a mailing whose layout or contents are predetermined by a newsletter template imported into Inxmail Professional (Import template library), select the relevant newsletter template and then select the required design in the section under the drop-down list.
7. Confirm your entries in the dialog box by clicking *OK*.
 8. The mailing opens on a new tab where it can be edited.

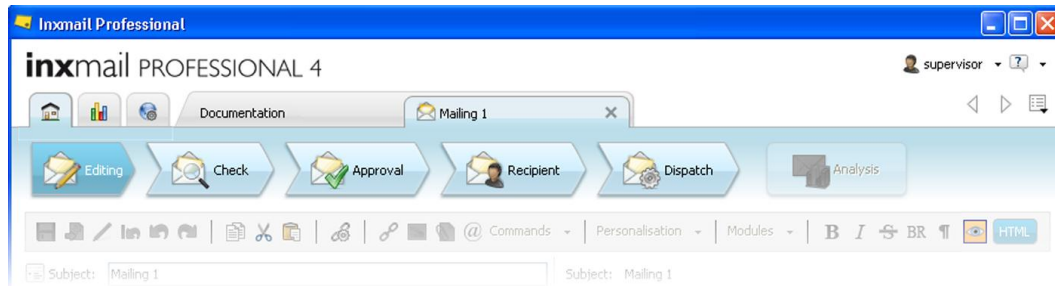




Fig. 8: Tab of the mailing


The mailing is also automatically added to the table on the tab of the mailing list >  *Mailings agent* > *Mailings* tab.

You have now created a new mailing.

You can now create the mailing content in the mailing tab in the  *Editing* workflow step. For example, this process allows you to:

- Specify the mailing subject
- Create personalised text (for example, the name or surname of the recipient)
- Add links to your mailing
- Add file attachments to your mailing
- For HTML or multipart mailings only: Add images to your mailing

For more information, see the Inxmail Professional User Manual under 'Mailings (editing)' or 'Mailings (advanced editing)'.

In the  *Check* workflow step, you can then check your mailing (for example, to see if it is properly displayed in different email programs). For more information, see the Inxmail Professional User Manual under 'Mailings (check)'.

3.3 Sending the mailing

1. To ensure that your recipient data is up-to-date, run the recipient transfer in Microsoft Dynamics CRM 2011 again (see *Transferring recipients*, page 5).

- Open your mailing in Inxmail Professional in the  *Recipients* workflow step.

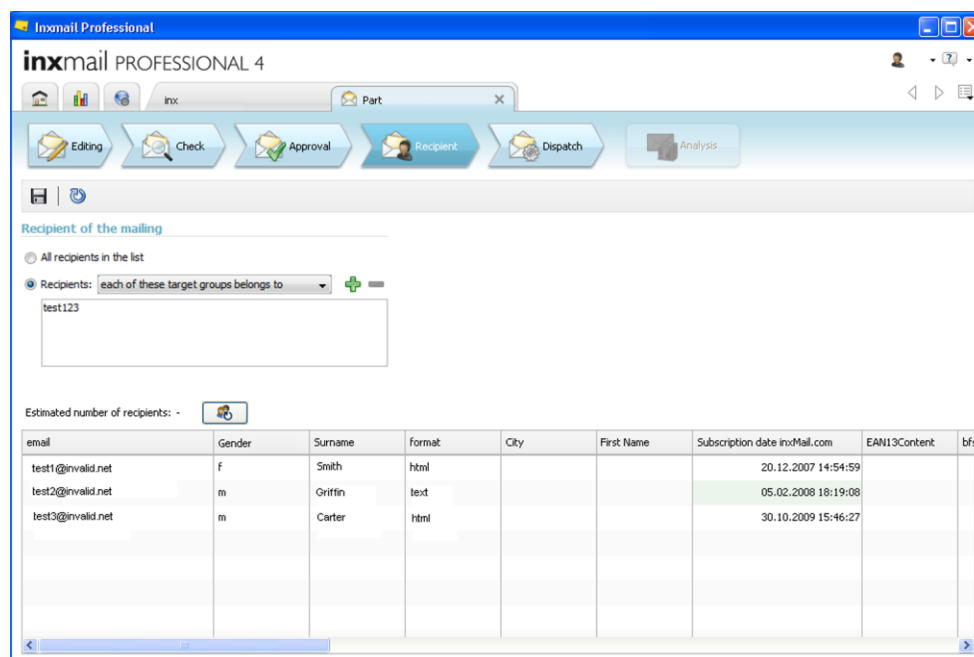



Fig. 9: 'Recipients' workflow step

- Select the *All recipients in the list* option.
The table below the input fields displays all recipients to whom the mailing will be sent.
- Open the  *Dispatch* workflow step for the mailing.

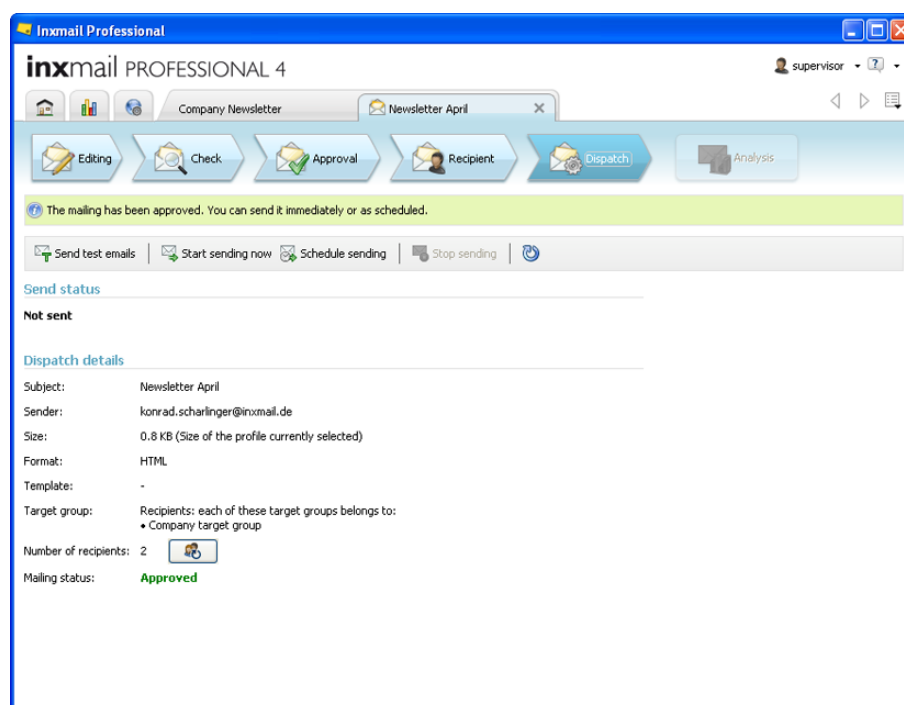


Fig. 10: 'Dispatch' workflow step

- Click the  *Start sending now* button to send the mailing immediately.

The dialog box opens.

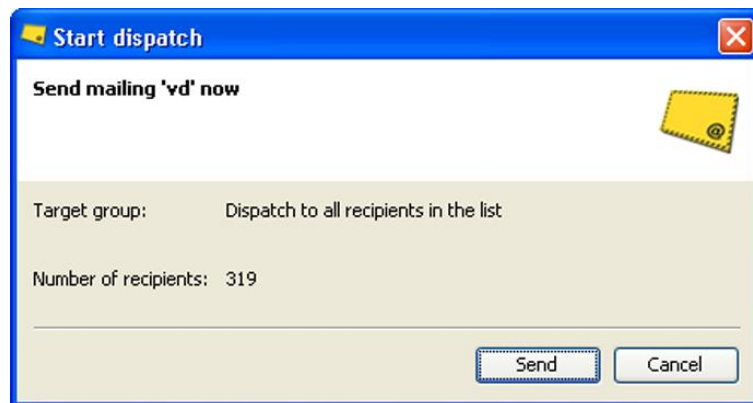


Fig. 11: 'Start sending' dialog box

6. Click the *Send* button in the dialog box.

A message window in which you need to confirm the dispatch by clicking Yes appears.

You have sent your mailing.

4 Return transfer: Reactions and reports

The following information can be transferred back from Inxmail Professional to Microsoft Dynamics CRM 2011 after sending the mailing:

Exactly which information is transferred back depends on the settings of your campaign activity (*Creating an Inxmail Professional campaign activity*, page 3).

- **Email activities:** A corresponding email activity is created in Microsoft Dynamics CRM 2011 for each contact or lead to which the mailing was sent.
- **Bounces:** If the email address of a contact or lead causes a bounce, this will automatically be saved for the contact or lead in Microsoft Dynamics CRM 2011.
- **Unsubscriptions:** If a contact or lead unsubscribes from the mailing list using the unsubscribe link in the mailing, they will automatically be excluded from the dispatch of mass emails in Microsoft Dynamics CRM 2011. They will not receive any more mailings over the 'Inxmail Professional' channel.
- **Campaign reactions:** The recipient's campaign reactions to the mailing (for example, click and opening rates) are saved in Microsoft Dynamics CRM 2011 for each campaign activity and/or each campaign.
- **Report:** You can request the Inxmail Professional report with key figures on the mailing in Microsoft Dynamics CRM 2011 and open it as a PDF version.
- **New leads:** If a recipient subscribes to the Inxmail Professional mailing list using a login form on your website, for example, a new lead will automatically be generated in Microsoft Dynamics CRM 2011.

4.1 Email activities

You can configure in your campaign activity that, for each contact or lead to which the mail was sent, a corresponding email activity is created in Microsoft Dynamics CRM 2011 (see *Creating an Inxmail Professional campaign activity*, page 3). This email activity is opened as follows:

1. Open the contact (*Marketing > Contacts*) or lead (*Marketing > Lead*) in Microsoft Dynamics CRM 2011.
2. Click *Closed Activities* in the *Related > General* area.

The list contains all email activities for the contact or lead. Sent mails are saved as email activity with the 'Email' activity type.

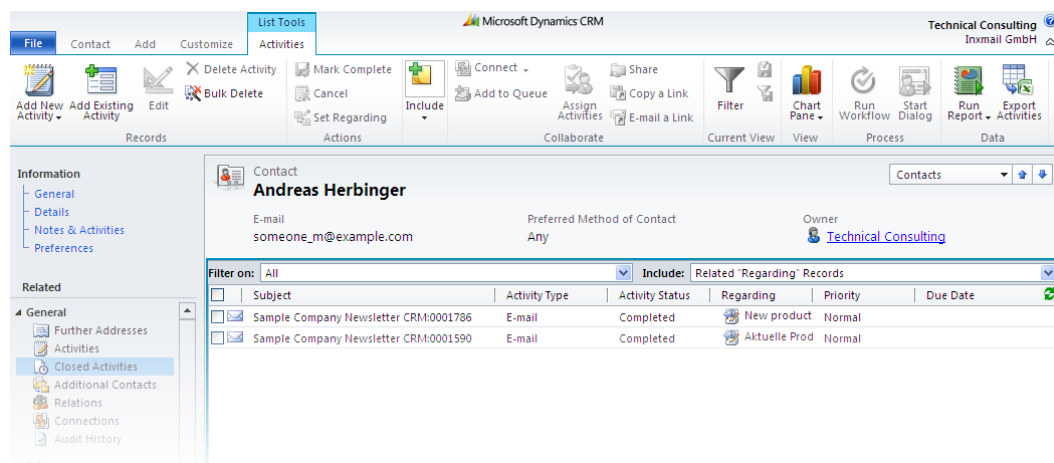


Fig. 12: Email activities of a contact

If you specified in the campaign activity that the email activity is to be saved completely, you can also open the (impersonal) sent mailing by clicking the subject in the email activity.

4.2 Bounces

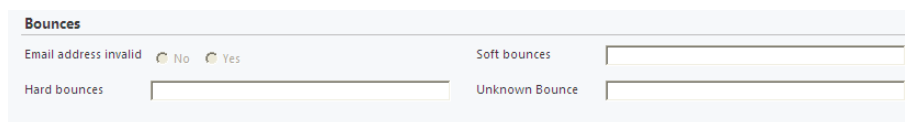
If the email address of a contact or lead causes a bounce, this will automatically be saved in Microsoft Dynamics CRM 2011 in the following location:

1. Open the contact or lead in Microsoft Dynamics CRM 2011.
2. In the *Settings* area, the fields under *Bounces* display the following:
 - Whether the email address was categorised as invalid as a result of a bounce

Email addresses categorised as invalid will not receive any more mailings over the 'Inxmail Professional' channel.

If an email address of a contact or lead categorised as invalid is changed, it will be automatically recategorised as valid. Mailings sent using the 'Inxmail Professional' channel will once again be sent to the contact or lead.

- Whether, which and how many bounces were caused.



| Bounces | |
|-----------------------|--|
| Email address invalid | <input type="radio"/> No <input type="radio"/> Yes |
| Soft bounces | <input type="text"/> |
| Hard bounces | <input type="text"/> |
| Unknown Bounce | <input type="text"/> |

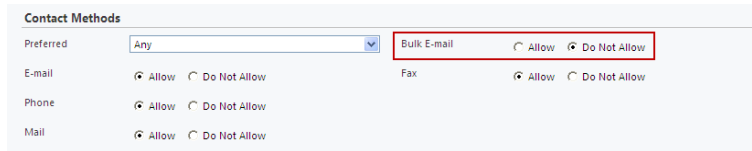
Fig. 13: Bounces

4.3 Unsubscriptions

If a contact or lead unsubscribes from the mailing list using the unsubscribe link in the mailing, they will automatically be excluded from the dispatch of mass emails in Microsoft Dynamics CRM 2011. They will not receive any more mailings over the 'Inxmail Professional' channel. This can be seen in the following location in Microsoft Dynamics CRM 2011:

1. Open the contact or lead in Microsoft Dynamics CRM 2011.

- You can see if the dispatch of bulk emails or mailings is permitted over the 'Inxmail Professional' channel for the contact or lead in the *Contact Methods* area under *Bulk Email*.



Contact Methods

Preferred: Any

Bulk E-mail ☐ Allow ☒ Do Not Allow

E-mail ☒ Allow ☐ Do Not Allow Fax ☒ Allow ☐ Do Not Allow

Phone ☒ Allow ☐ Do Not Allow

Mail ☒ Allow ☐ Do Not Allow

Fig. 14: Bulk Email not allowed

4.4 Campaign reactions

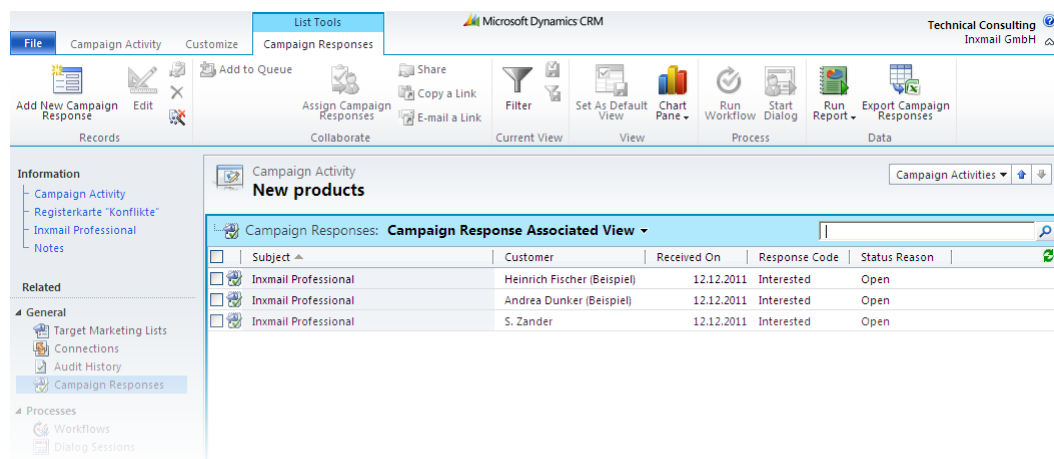
You can configure in your campaign activity if and when the recipients' campaign reactions (for example, the click and opening rates) should be saved in Microsoft Dynamics CRM 2011 (see *Creating an Inxmail Professional campaign activity*, page 3):

- On clicks:** A campaign reaction will be saved if the mailing recipient clicks a link in the mailing.
- Clicks and openings:** A campaign reaction will be saved if the mailing recipient opens the mailing **or** clicks a link in the mailing.

A maximum of one campaign reaction will be created for each recipient in a campaign activity or campaign. This can, however, contain multiple entries, for example, if the recipient clicked multiple links in the mailing.

A recipient's campaign reaction can be opened as follows:

- You can open campaign reactions for each campaign or for each campaign activity. To do so, open your campaign or campaign activity.
- Click *Campaign reactions* in the *Related > General* area.
- The list of campaign reactions appears.



Microsoft Dynamics CRM

Technical Consulting
Inxmail GmbH

File Campaign Activity Customize List Tools Campaign Responses

Add New Campaign Response Edit Add to Queue Assign Campaign Responses Share Copy a Link Filter Set As Default View Chart Pane Run Workflow Start Dialog Run Report Export Campaign Responses

Records Collaborate Current View View Process Data

Information

- Campaign Activity
- Registerkarte "Konflikte"
- Inxmail Professional
- Notes

Related

- General
 - Target Marketing Lists
 - Connections
 - Audit History
 - Campaign Responses
- Processes
 - Workflows
 - Dialog Sessions

Campaign Activity

New products

Campaign Activities

Campaign Responses: Campaign Response Associated View

| | Subject | Customer | Received On | Response Code | Status Reason |
|--------------------------|----------------------|-----------------------------|-------------|---------------|---------------|
| <input type="checkbox"/> | Inxmail Professional | Heinrich Fischer (Beispiel) | 12.12.2011 | Interested | Open |
| <input type="checkbox"/> | Inxmail Professional | Andrea Dunker (Beispiel) | 12.12.2011 | Interested | Open |
| <input type="checkbox"/> | Inxmail Professional | S. Zander | 12.12.2011 | Interested | Open |

Fig. 15: List of campaign reactions

- To open a recipient's campaign reactions, click the campaign reaction subject.

- In the campaign reaction, you can see which links the recipient clicked, for example.

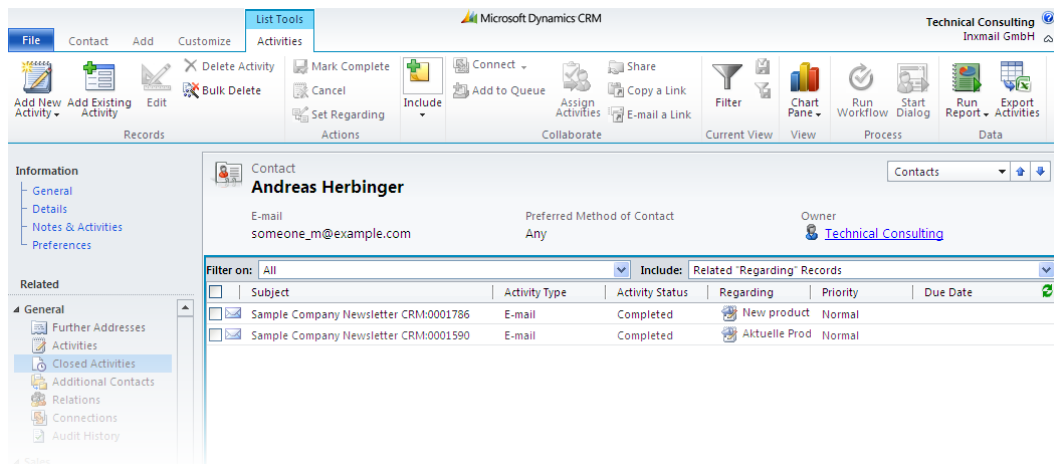


Fig. 16: Campaign reactions for a recipient

4.5 Inxmail Professional report

After sending the mailing, you can open the Inxmail Professional report with key mailing data in Microsoft Dynamics CRM 2011 as follows:

- Open your campaign activity in Microsoft Dynamics CRM 2011.

- Click the  *Request report* button.

A window appears.

- Select the language and time zone in which the report should be prepared. Then click the *Request* button.

If a window appears asking you to specify that 'mixed' content must be displayed, confirm with *Yes*.

The 'Important key figures for a mailing' report will be generated in Inxmail Professional and transferred to Microsoft Dynamics CRM 2011 as a PDF version.

- Click the *Notes* area in your campaign activity. You will find a note entry for the report.

If the report is not yet displayed there, refresh your browser window by pressing F5.

- Click the note entry.

The dialog box opens.

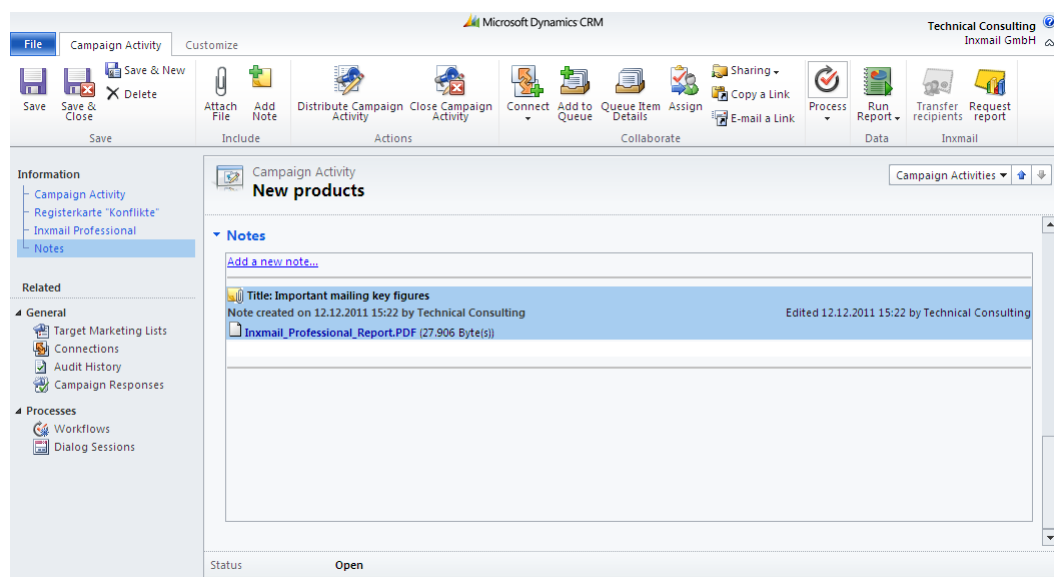


Fig. 17: Dialog box to download the report

6. Click **Save** to save a PDF version of the report. Then open the saved PDF file.

Report: Important key figures for a mailing

Mon, 12/12/2011 02:22 PM

Important key figures for a mailing

This report gives a summary view of the most important performance data of a mailing.

- Mailing name
- Subject
- List name
- Report from
- Report to
- Report created on

New products

Sample Company Newsletter

New products

Mon, 12/12/2011 02:15 PM

Mon, 12/12/2011 02:15 PM

Mon, 12/12/2011 02:22 PM

General mailing data

| | |
|--|--------------------------|
| Number of recipients contacted (gross) | 16 |
| Number of recipients reached (net) | 15 |
| Number of hard, soft and unknown bounces | 1 (6.25%) |
| Target groups | (none) |
| Format | Multipart |
| Average size of the mailing (in KB) | 74 |
| Dispatch date | Mon, 12/12/2011 02:15 PM |
| Dispatch end | Mon, 12/12/2011 02:15 PM |
| Sending speed (mails/h) | 153,600 |

Click response data

| | |
|-------------------------------|--------|
| Number of opening* recipients | 3 |
| Opening rate* | 20.00% |

Fig. 18: Inxmail Professional report

For more information on the 'Important key figures for a mailing' report, see the 'Reports' section of the Inxmail Professional User Manual.

4.6 New leads

In your campaign activity, you can specify that Microsoft Dynamics CRM 2011 should automatically generate leads when recipients subscribe to the mailing list (see *Creating an Inxmail Professional campaign activity*, page 3). This allows you to expand your lead data.

Recipients can, for example, subscribe to the mailing list using a subscription form on your website. If you use the double opt-in subscription procedure, the recipients reconfirm their subscription, and you get qualified email addresses.

Information on how to create such a subscription form and integrate it into your Web pages can be found in the Inxmail Professional User Manual under 'JSP templates for Web pages'.

We recommend using different campaign activities (or mailing lists) to generate leads and send mailings.

The reason for this: It is necessary for transferring recipient data to send mailings (see Transferring recipients, page 5). This procedure will overwrite all new subscriptions to the mailing list in Inxmail Professional.

You can see if a lead was generated in this way in Microsoft Dynamics CRM 2011 in the *Details* area of the lead (*Marketing > Leads*). 'Inxmail Professional' will have been entered as the source of the lead.

The 'Inxmail Professional' lead source is not lost if you change the lead at a later point in a contact.

5 Error handling

A corresponding message will appear if errors (connection problems, for example) occur while working with the Inxmail Professional for Microsoft Dynamics CRM 2011 Connector.

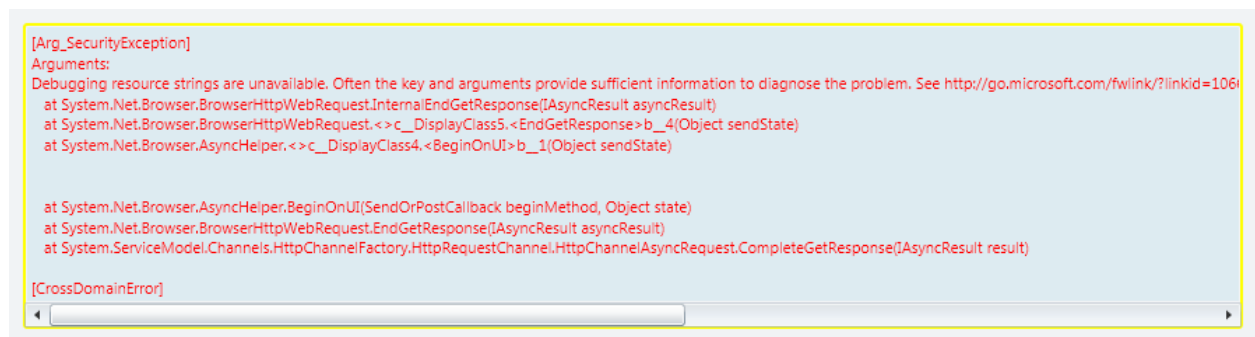


Fig. 19: Message if recipients could not be transferred to Inxmail Professional

In this case, contact your Microsoft Dynamics CRM 2011 administrator. The administrator will be able to trace the cause of the error in the Microsoft Dynamics CRM 2011 log file and possibly resolve the problem.

6 Index

C

Campaign reactions • 3

Channel • 3

Connection problems • 17

E

Email activity • 3

G

Generate leads • 3

H

Hard bounces • 3

P

Properties agent • 6

S

Soft bounces • 3

U

Unknown bounces • 3



Legal notice

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