

# Inxmail Professional for Microsoft Dynamics CRM 2011

## Installation manual



Version      MSCRM-T-EN-13-2

© 2013 Inxmail GmbH, Wentzingerstr. 17, 79106 Freiburg

Tel.: (+49-761) 296979-9 | Fax: (+49-761) 296979-9

info@inxmail.de | www.inxmail.de

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## About this document

### Release

This document relates to the following releases/versions:

- Inxmail Professional 4.3
- Microsoft Dynamics CRM 2011

Integration version: 1.0.8.0

### Target group

This document is intended for users who install/maintain 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

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# 1 System: Architecture and requirements

## 1.1 System architecture

The Inxmail Professional for Microsoft Dynamics CRM 2011 Connector allows you to compare data between Inxmail Professional and Microsoft Dynamics CRM 2011. The connector consists of the following elements:

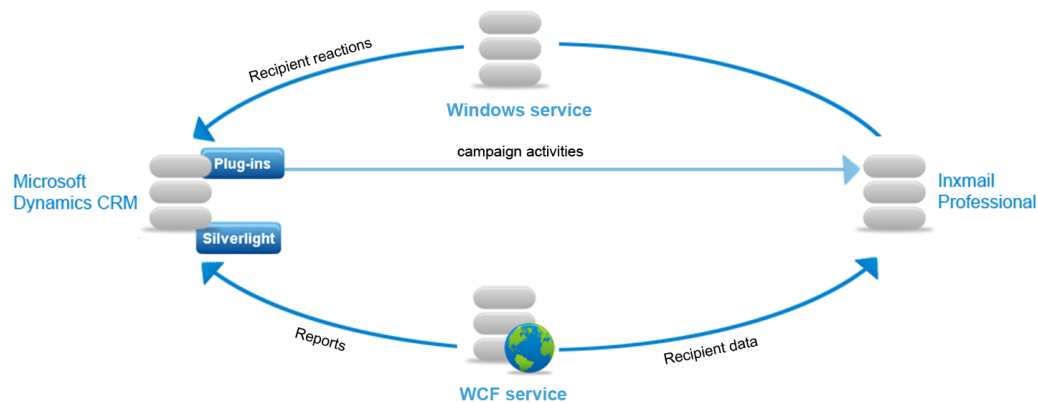


Fig. 1: System architecture

- Windows service (synchronisation service)  
This service transfers recipient reactions from Inxmail Professional to Microsoft Dynamics CRM 2011, for example, openings, clicks and bounces.

If you have specified that Web subscriptions should be generated as leads in Microsoft Dynamics CRM 2011 (see the Inxmail Professional for Microsoft Dynamics CRM 2011 User Manual), this transfer will also be handled by the Windows service.

- WCF service (communicates with the Silverlight extension)  
This service transfers recipient data from Microsoft Dynamics CRM 2011 to Inxmail Professional.

The recipient data is not transferred automatically. You must trigger the transfer in Microsoft Dynamics CRM 2011 (see the Inxmail Professional for Microsoft Dynamics CRM 2011 User Manual).

The service also transfers reports (analyses of the mailing) from Inxmail Professional to Microsoft Dynamics CRM 2011.

The reports are not transferred automatically. You can request the report for each campaign activity in Microsoft Dynamics CRM 2011 (see the Inxmail Professional for Microsoft Dynamics CRM 2011 User Manual).

## 1.2 System requirements

### 1.2.1 Microsoft Dynamics CRM

Microsoft Dynamics CRM 2011 supports the following types of installation:

- OnPremise (own hosting)
- IFD (Internet Facing Deployment) (own hosting or partner hosting)

- OnDemand (online version)

**Note** We urgently recommend always installing all Update Rollups for Microsoft Dynamics CRM 2011!

### 1.2.2 Windows service (synchronisation service)

The following system requirements must be met in order to use the Windows service (synchronisation service):

All requirements have already been met if you have installed the Microsoft Dynamics CRM 2011 Server.

- Microsoft Server 2008/2008R2/2012
- Microsoft Windows Vista/7/8
- Microsoft .NET Framework 4

### 1.2.3 WCF service (recipient service)

The following system requirements must be met in order to use the WCF service (recipient service):

All requirements have already been met if you have installed the Microsoft Dynamics CRM 2011 Server.

- Microsoft Server 2008/2008R2/2012
- Microsoft Windows Vista/7/8
- Microsoft .NET Framework 4
- .NET/WCF capable Web server (for example, IIS with the Windows Communication Foundation Extension and a registered ASP.NET extension)

### 1.2.4 Inxmail Professional

The requirements for the Inxmail Professional for Microsoft Dynamics CRM 2011 Connector are as follows:

- Inxmail Professional Version 4.0.2 or higher
- An Inxmail Professional login assigned with the 'API user' and 'User' standard role

For more information on standard roles, see the Inxmail Professional User Manual under 'Settings (licence customers)'.

## 2 Importing the solution package

Import the 'Inxmail Professional' solution package into Microsoft Dynamics CRM 2011 as follows:

1. Click **Settings**, and then select **Solutions** in the **Customisations** section.

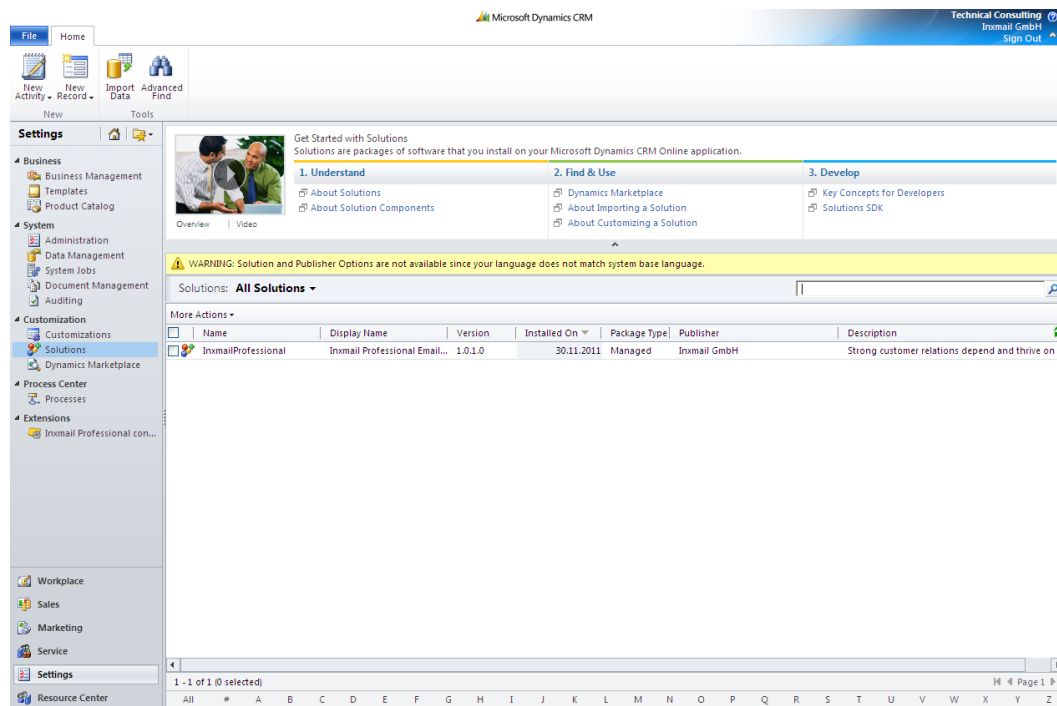



Fig. 2: Importing the solution

2. Click the  **Import** button.  
The dialog box opens.

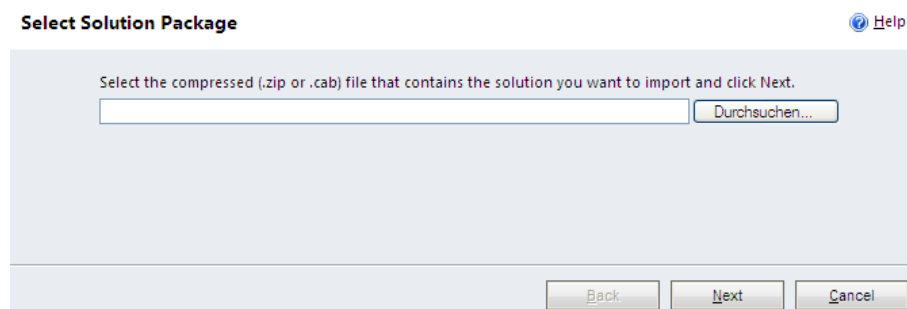


Fig. 3: 'Select Solution Package' dialog box

3. To import the 'Inxmail Professional email marketing' solution package, select the *InxmailProfessional\_x\_x\_x\_x\_managed.zip* file in the dialog box.
4. Click *View solution package details* for manufacturer information.  
Then click *Next*.
5. To register the plug-ins, click the *Activate any processes and enable any SDK message processing steps included in the solution* check box.

The solution package is imported. The dialog box shows the import result.

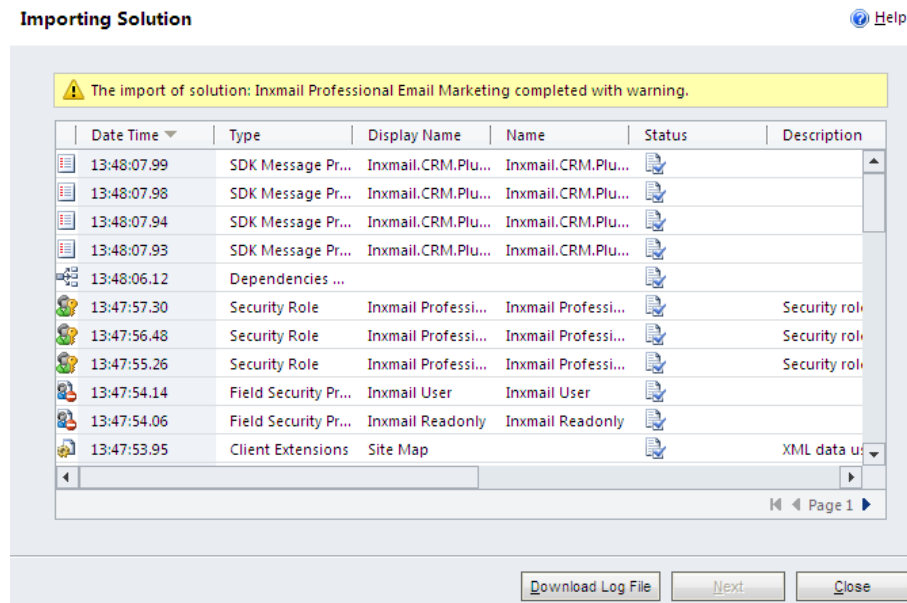


Fig. 4: Import result

## 3 Installing the necessary services

### Overview

You need to install the following services to use the Inxmail Professional Connector:

- Windows service (synchronisation service), in order to transfer recipient reactions from Inxmail Professional to Microsoft Dynamics CRM 2011
- WCF service (recipient service), in order to transfer recipient data from Microsoft Dynamics CRM 2011 to Inxmail Professional

The services can be installed:

- Individually on a Microsoft Windows Server
- Together on the Microsoft Windows Azure Platform; To do so, you must install the Microsoft Windows Azure Platform Package

### 3.1 Installation on a Microsoft Windows Server

#### 3.1.1 Installing the Windows service (synchronisation service)

1. Run the *setup.exe* file.

You need administrator rights on the Microsoft Windows Server to carry out the installation.

An installation wizard appears to guide you through the installation.

2. Encrypt your Microsoft Dynamics CRM 2011 password as follows:



- a. Open the *InxmailPasswordEncrypter.exe* program.



Fig. 5: Password encryption

The *InxmailPasswordEncrypter.exe* program is part of the installation package.

- b. Enter your password and click the *Encrypt* button.

The encrypted password is displayed.

The encrypted password is required for the following steps.

3. After installation, open the *Inxmail.CRM.SynchronizationService.WinService.exe.config* file in a text editor that supports XML editing.
4. In this file, go to the *crmSettings* section under *organisations* and adjust the settings for the following entries:

Replace the example values in the code with your own settings, for example, replace the value of the 'password' attribute with your encrypted password.

Ensure that the specified 'user' has at least rights to the Microsoft Dynamics CRM 2011 'Inxmail Professional Synchronization' user role (see 5 User roles, page 16).

<crmSettings>

<organisations>

<!--

Name: Name of the organisation in Microsoft CRM (case-sensitive)

Domain: Active directory domain of the user used for CRM authentication (OnPremise and IFD only)

User: Name of the CRM user used for CRM authentication (Windows Live ID for CRM Online)

Password: Encrypted password for the user

Server URL: URL of the Microsoft CRM Server without trailing slash and organisation name (for example, http://crm, http://myserver:5555, https://myorg.crm4.dynamics.com)

Installation type: Type of Microsoft CRM installation. Valid values include:

OnPremise, Online and IFD

-->

<organisation name='Contoso' domain='contoso'

user='Administrator' password='

serverurl='http://crm' installationtype='OnPremise' />

</organisations>

</crmSettings>

Add further organisations, if necessary, by copying the existing organisation and adjusting it as necessary.

The link between an Inxmail Professional client and an organisation in Microsoft Dynamics CRM 2011 must be unique.

You can only configure one organisation in Microsoft Dynamics CRM 2011 for each Inxmail Professional client, and vice versa (see *Inxmail Professional Configuration*, page 14).

5. Save the file.

### 3.1.2 Installing the WCF service (recipient service)

1. Copy the files for the WCF service to any directory on the Microsoft Windows Server (for example, to *C:\Program Files\Inxmail GmbH\WCF*).
2. Start the Internet Information Service Manager (IIS Manager) on the Microsoft Windows Server.
3. Open the application pool overview.
4. To add a new application pool, right-click in the application pool overview and select *Add Application Pool*.

The dialog box opens.

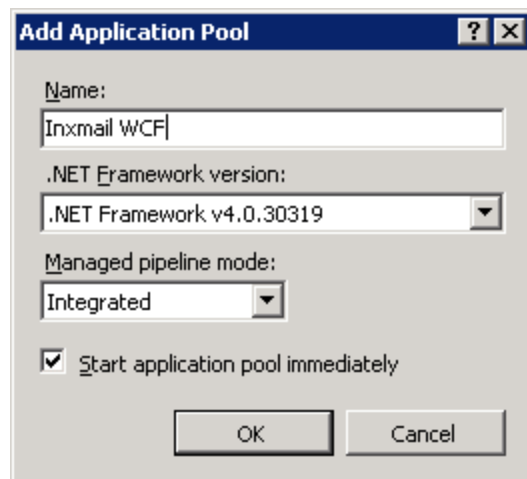


Fig. 6: 'Add Application Pool' dialog box

5. Enter the following in the dialog box:
  - a. Enter 'Inxmail WCF' under *Name*.
  - b. Select Version 4.0 under *.NET Framework version*.
  - c. Select the 'Integrated' value under *Managed pipeline mode*.
  - d. Select the *Start application pool immediately* checkbox and confirm with *OK*.

The new application pool starts.

6. Click *Sites* in the IIS Manager.

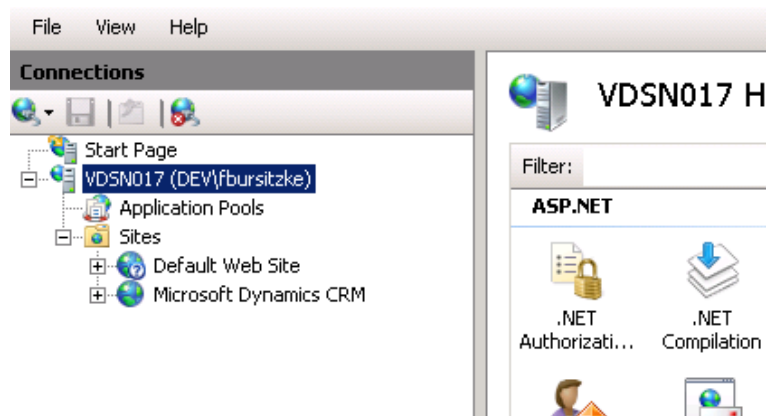


Fig. 7: IIS Manager > Sites

7. You can install the WCF service as a new site in the IIS Manager or integrate it into an existing website.  
Proceed as follows to install the WCF service as a new site in the IIS Manager:
  - a. Right-click *Sites* and select *Add Website*.  
The dialog box opens.

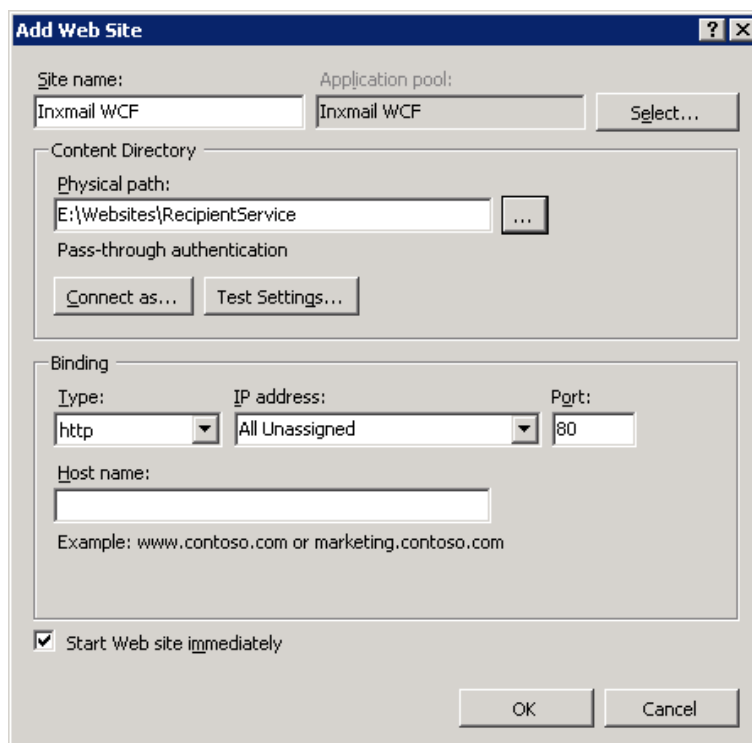


Fig. 8: 'Add Website' dialog box

- b. Enter any name for the website (for example, 'Inxmail WCF').  
Then select the newly created application pool.  
Enter the directory to which you copied the files for the WCF service as the physical path.  
Confirm your entries by clicking *OK*.

Proceed as follows to integrate the WCF service into an existing website:

- c. Right-click in the *Sites* area and select *Add Application*.

The dialog box opens.

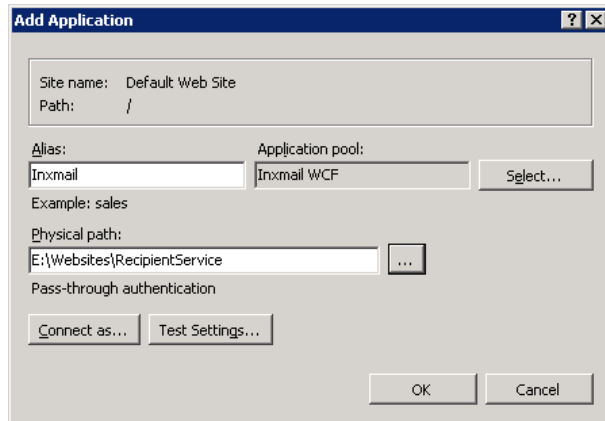


Fig. 9: 'Add Application' dialog box

- d. Enter an alias (for example, 'Inxmail') in the dialog box, which will then later be added to the URL when calling the service (for example, `http://localhost/Inxmail`).  
Select the newly created application pool.  
Enter the directory to which you copied the files for the WCF service as the physical path.  
Confirm your entries by clicking *OK*.

- e. Copy the *clientaccesspolicy.xml* and *crossdomain.xml* files from the *Inxmail WCF* directory into the website root directory.

This step is omitted if the service is set up as an independent website. When installing under the standard Web page or another page, the files must be copied to the corresponding website root directory (for example, `C:\inetpub\wwwroot`).

## 8. Web.config customisations

By default, the WCF service contains two endpoints, one for unencrypted communication using http and one for encrypted communication using https (SSL). This configuration may result in errors if your website is only provided via http or https. In this case, it is necessary to customise the web.config file. To do so, open the web.config file in an appropriate editor. We recommend an XML capable editor (such as Notepad++, Microsoft Visual Studio), however, a simple text editor may also be used.

Next, identify the endpoints in the configuration/system.serviceModel/services/service area and the associated bindings in the configuration/system.serviceModel/bindings section.

```
<services>
  <service name='Inxmail.CRM.WCF.RecipientService'>
    <endpoint address=' ' binding='basicHttpBinding' bindingConfiguration='unsecureBinding'
      bindingNamespace='http://apiservice.xpro.inxmail.com'
      contract='Inxmail.CRM.SynchronizationService.WCF.IRecipientService' />
    <endpoint address=' ' binding='basicHttpBinding' bindingConfiguration='secureBinding'
      bindingNamespace='http://apiservice.xpro.inxmail.com'
      contract='Inxmail.CRM.SynchronizationService.WCF.IRecipientService' />
  </service>
</services>

<bindings>
  <basicHttpBinding>
    <binding name='unsecureBinding' closeTimeout='00:15:00' openTimeout='00:15:00'
      receiveTimeout='00:15:00' sendTimeout='00:15:00' maxBufferSize='2147483647'
      maxBufferPoolSize='2147483647' maxReceivedMessageSize='2147483647'>
      <security mode='None' />
    </binding>
    <binding name='secureBinding' closeTimeout='00:15:00' openTimeout='00:15:00'
      receiveTimeout='00:15:00' sendTimeout='00:15:00' maxBufferSize='2147483647'
      maxBufferPoolSize='2147483647' maxReceivedMessageSize='2147483647'>
      <security mode='Transport'>
        <transport clientCredentialType='None' />
      </security>
    </binding>
  </basicHttpBinding>
</bindings>
```

Remove the entries with secureBinding if the WFC service is only provided via http. Use unsecureBinding to remove the entries if the service is exclusively provided via https.

9. To test your installation, open the *RecipientService.svc* file in your Web browser, for example, using the address `http://servername:port/RecipientService.svc`. Use it to test an address as it will later be called up by the clients.

10. You will see the following result if installation was successful (when using SSL, the browser may not communicated any certificate errors as the recipient transfer will fail as a result of the missing/incorrect certificate):



Fig. 10: Successful installation

## 3.2 Installation on the Microsoft Windows Azure Platform

To install the Windows service (synchronisation service) and the WCF service (recipient service) on the Microsoft Windows Azure Platform, you must deploy the Microsoft Windows Azure Platform Package in Windows Azure. This package consists of the following files:

- Program package (\*.cspkg file extension)
- Configuration file (\*.cscfg file extension)
- By default, no SSL endpoint for the WCF service is provided for installation in Windows Azure. An individual certificate is required in order to deploy an SSL-capable endpoint. This must be indicated additionally in the Azure package. Please contact Inxmail Support if you would like to the service to be available via SSL.

### 3.2.1 Preparing the Windows Azure account (cloud service and storage account)

The Windows and WCF services are deployed in Azure as a cloud service.

All relevant information related to creating and deploying an Azure cloud service is available in Microsoft's Online Help and Support at <http://www.windowsazure.com/en-us/manage/services/cloud-services/>.

Log entries for the cloud service are stored in an Azure storage account.

All relevant information related to creating and deploying an Azure storage account is available in Microsoft's Online Help and Support at <http://www.windowsazure.com/en-us/manage/services/storage/>.

### 3.2.2 Configuring the package

Before you deploy the Microsoft Windows Azure Platform Package in Windows Azure, you must configure it as follows:

1. Determine your Microsoft Dynamics CRM 2011 connection data (that is, the name of the storage account and the primary access key):

2. Encrypt your Microsoft Dynamics CRM 2011 password as follows:

- a. Open the *InxmailPasswordEncrypter.exe* program.
- b. Enter your password and click the *Encrypt* button.  
The encrypted password is displayed.

The encrypted password is required for the following steps.

3. Open the Windows Azure Package configuration file in a text editor such as notepad.exe. Then, in the *Configuration Settings* section, specify the following for the 'reaction-sync-service' and 'recipient-sync-service' roles.

Replace the following in the code example below:

- Replace '{your account}' with the name of the storage account.
- Replace '{your key}' with the primary access key.
- Use your encrypted Microsoft Dynamics CRM 2011 password as the 'password'
- Enter a synchronisation interval of at least five minutes (that is, a single value = 5) under 'SyncIntervallnMinutes'.

```
<!-- This role is the reaction-sync-service (periodical sync) -->
<Role name='Inxmail.CRM.SynchronizationService.Azure'>
<!-- The reaction synchronisation *must* only be run in 1 instance! -->
<Instances count='1' />
<ConfigurationSettings>
<!-- Enter the credentials for your storage account for logging. -->
<Setting name='Microsoft.WindowsAzure.Plugins.Diagnostics.ConnectionString'
value='DefaultEndpointsProtocol=https;AccountName={your-account};AccountKey={your-key}' />
<!-- Type of the Microsoft CRM installation. Valid values are OnPremise, Online and IFD -->
<Setting name='InstallationType' value='' />
<!-- Name of the organisation in Microsoft CRM (case-sensitive) -->
<Setting name='Name' value='' />
<!-- URL of the Microsoft CRM Server without trailing slash and organisation name (for example, http://crm,
http://myserver:5555, https://myorg.crm4.dynamics.com) -->
<Setting name='ServerUrl' value='' />
<!-- Name of the CRM user used for CRM authentication (Windows Live ID for CRM Online) -->
<Setting name='Username' value='' />
<!-- Encrypted password for the user -->
<Setting name='Password' value='' -->
<!-- Active directory domain of the user used for CRM authentication
(OnPremise and IFD only) -->
<Setting name='Domain' value='' />
<!-- The synchronisation interval (in minutes) of reactions and recipients from <product name> to the CRM
system. -->
<Setting name='SyncIntervallnMinutes' value='60' />
</ConfigurationSettings>
</Role>
```

```

<!-- This role is the recipient-sync-service (user-triggered sync) -->
<Role name='Inxmail.CRM.WCF.Azure'>
<!-- ConAbb. the number of instances for the recipient synchronisation -->
<Instances count='1' />
<ConfigurationSettings>
<Setting name='Microsoft.WindowsAzure.Plugins.Diagnostics.ConnectionString'
value='DefaultEndpointsProtocol=https;AccountName={your-account};AccountKey={your-key}' />
</ConfigurationSettings>
</Role>

```

### 3.2.3 Configuring load distribution and high availability

You can operate multiple instances of the WCF service to facilitate load distribution and improve availability of the WCF service. The following configuration steps are required:

1. Open the Windows Azure Package configuration file in a text editor.
2. Specify the number of instances of the WCF service for recipient transfer using the following value:  
The value entered in the 'Inxmail.CRM.WCF.Azure' role in the 'Instances' element for the 'count' attribute.
  - <Role name='Inxmail.CRM.WCF.Azure'>
  - <Instances count='2' />
  - <ConfigurationSettings>
  - ....
  - </ConfigurationSettings>
  - </Role>

**Note** that for technical reasons the Windows service to transfer recipient reactions **cannot** run in multiple instances. It must always be set to the '1' value (role 'Inxmail.CRM.SynchronizationService.Azure'). Select a larger synchronisation interval to correspond to the size of your client (*Configuring the package*, page 10).

### 3.2.4 Deploying the package in Windows Azure

If one of the two services (WCF or Windows service) has not been deployed after this period of time, a configuration error has likely occurred. In this case, check your settings in the Microsoft Windows Azure Platform Package (see *Configuring the package*, page 10).



If deployment of the package was successful, the following result will appear under <http://testfirma.cloudapp.net/RecipientService.svc>:

**RecipientService Service**

You have created a service.

To test this service, you will need to create a client and use it to call the service. You can do this using the svcutil.exe tool from the command line with the following syntax:

```
svcutil.exe http://localhost:8012/RecipientService.svc?wsdl
```

This will generate a configuration file and a code file that contains the client class. Add the two files to your client application and use the generated client class to call the Service. For example:

**C#**

```
class Test
{
    static void Main()
    {
        RecipientServiceClient client = new RecipientServiceClient();

        // Use the 'client' variable to call operations on the service.

        // Always close the client.
        client.Close();
    }
}
```

**Visual Basic**

```
Class Test
Shared Sub Main()
    Dim client As RecipientServiceClient = New RecipientServiceClient()
    ' Use the 'client' variable to call operations on the service.

    ' Always close the client.
    client.Close()
End Sub
End Class
```

Fig. 11: Successful package deployment

### 3.2.5 Monitoring the services using the log

The services log actions and errors. This log is located in a table of the storage account and can be opened using an appropriate program, for example, using the 'Azure Storage Explorer'.

The 'Azure Storage Explorer' from Neudesic can be downloaded for free from <http://azurestorageexplorer.codeplex.com>

To open the log, you must add a Windows Azure account as follows:

1. Open the 'Azure Storage Explorer' program.
2. Click the *Add Account* button.
3. Enter your login data for the storage account (see *Configuring the package*, page 10).
4. The Windows Azure account is added. The log entries for the WCF and Windows services can be found in the 'WADLogsTable' table

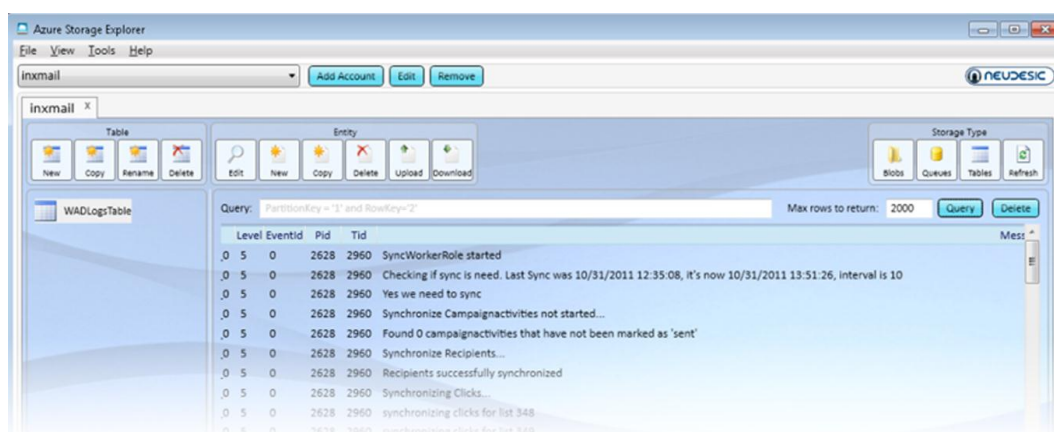



Fig. 12: Log

## 4 Inxmail Professional Configuration

### 4.1 Setting up Inxmail Professional Configuration

1. In Microsoft Dynamics CRM 2011, click *Settings > Inxmail Professional > Configurations*.
2. Click the  **New** button to create a new configuration.

A window appears.

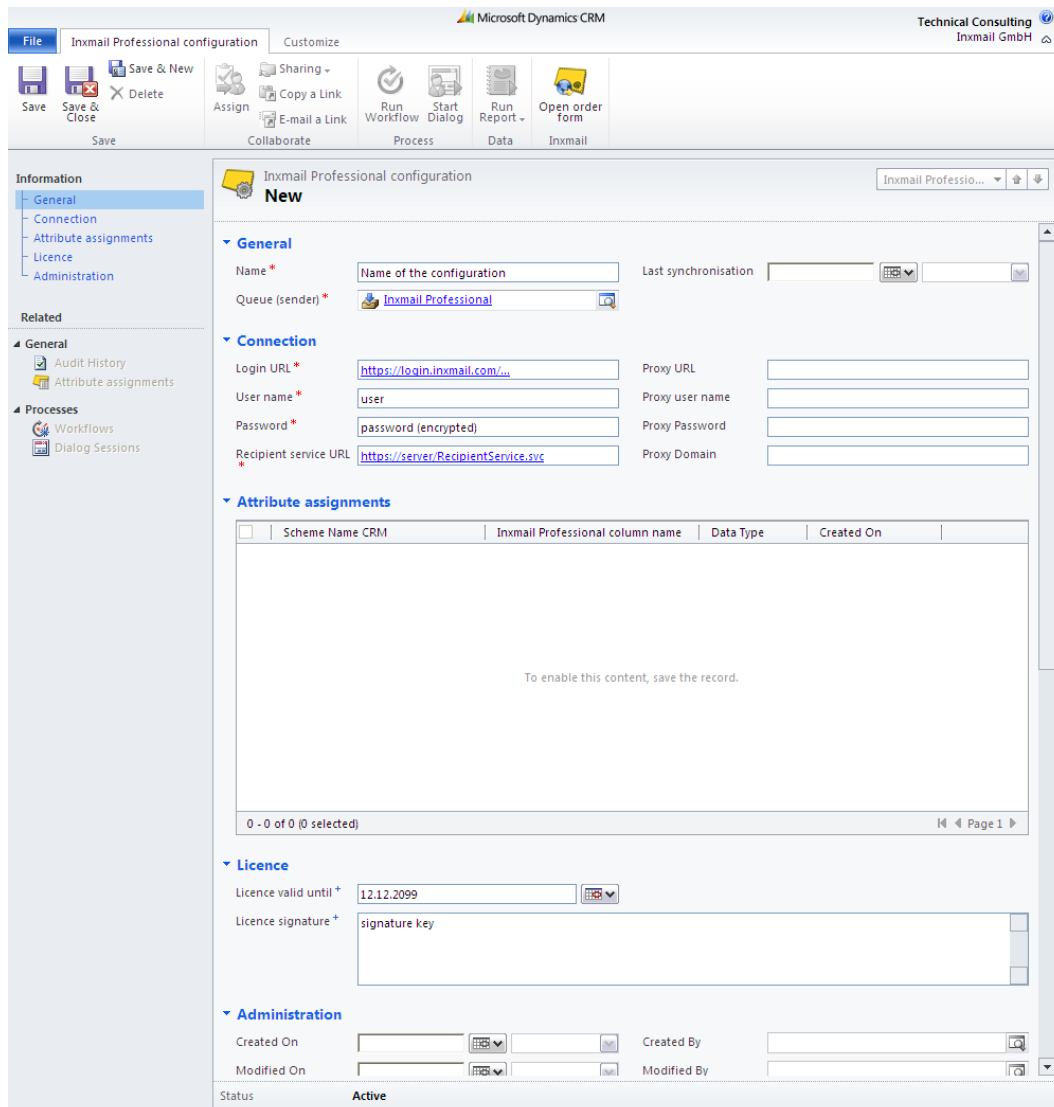



Fig. 13: Creating a new configuration

3. Enter the following in the window:
  - a. Enter a name for the configuration, for example, Inxmail Professional.
  - b. You must select a queue in order for Microsoft Dynamics CRM 2011 to be able to save the mailing dispatch to the contacts and leads as an email activity.  
The queue must have a valid email address. The email address of this queue is then used as the sender address when email activities are concerned.
  - c. Enter your connection data under *Connection*.

Enter your encrypted password in the *Password* field. For details on how to encrypt your password, see *Installing the Windows service (synchronisation service)*, page 4.

Enter the WCF service's address (including 'RecipientService.svc') in the *Recipient Service URL* field. The address must be accessible from a client computer (do not use 'localhost'). Additionally, when using an encrypted connection via https, ensure that the client addresses can be called up in your browser without certificate errors. Under certain circumstances, for example, when using a self-signed certificate, it may be necessary to distribute the issuing root certification authority on the client computers.

- d. Enter your licence data for the Inxmail Professional for Microsoft Dynamics CRM 2011 Connector under *Licence*

If you do not yet have a licence for the Inxmail Professional for Microsoft Dynamics CRM 2011 Connector, you can order one using the  *Open order form* button.

- e. Save your settings.



## 4.2 Setting up the attribute assignments

Attribute assignments specify which fields of the contacts and leads are transferred to the corresponding Inxmail Professional recipient table.

You can freely configure which attributes you would like to transfer to Inxmail Professional. By doing this, you can use standard CRM fields and your own fields. The 'text' and 'option set' fields are currently supported.

The email address fields (*emailaddress1*) and the data records IDs in the CRM (*contactID*, *leadID*) are always transferred and therefore do not require special configuration.

Proceed as follows to create a new attribute assignment:

1. Open the previously created Inxmail configuration in Microsoft Dynamics CRM 2011 (*Setting up Inxmail Professional Configuration*, page 14).
2. Click  *Attribute Assignments* under *Related > General*.
3. Click the  *Add new attribute assignment* button.

A window appears.

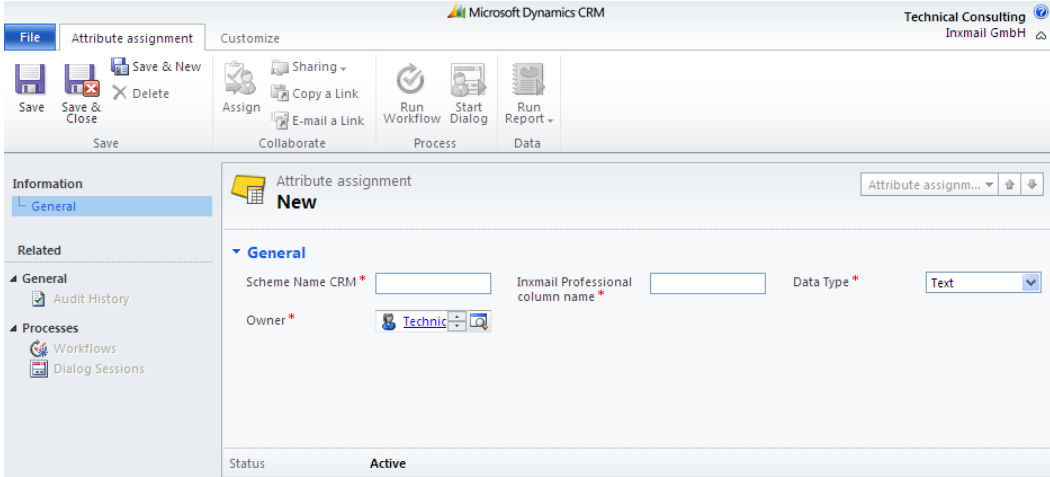


Fig. 14: Adding a new attribute assignment

4. Enter the following in the window:

- a. Specify the Microsoft Dynamics CRM 2011 schema name of the attribute (for example: address1\_line1).
- b. Specify the Inxmail Professional recipient table to which the attribute should be assigned.  
Note that this recipient table column must already have been created in Inxmail Professional with the 'text' column type.
- c. Select the attribute data type.  
The 'text' and 'option set' data types are supported. The value of the attribute (not the display text) will be transferred in the case of an option set.  
Select the recipient type for which this attribute applies in the Entity field. Select the 'Contact and lead' entry if a field is contained in both contact and lead (for example, 'address1\_line1'). For fields that are only contained in one recipient type (for example, the 'gendercode' attribute is only present in contact), select the corresponding entry. The recipient transfer will fail if the system was not configured correctly.
- d. Save your settings.

## 5 User roles

All users working with contacts and leads in Microsoft Dynamics CRM 2011 must have read access to the 'Inxmail Professional Configuration' and 'Attribute Assignments' entities.

User roles can be allocated in the *Settings* module under *System > Administration > Users* in Microsoft Dynamics CRM 2011. You can specify which user roles (security roles) each user receives. For more information, see the Microsoft Dynamics CRM 2011 Online Help system.

### 5.1 Inxmail Professional User

This user role is assigned to users who will use the Inxmail Professional for Microsoft Dynamics CRM 2011 Connector. This allows them to:

- Read the Inxmail Professional configuration and attribute assignments
- Select a campaign activity from the 'Inxmail Professional' channel and thereby automatically transfer it to Inxmail Professional as a mailing list
- Edit the Inxmail Professional fields in a campaign activity
- Transfer recipients to Inxmail Professional
- Request reports from Inxmail Professional

### 5.2 Inxmail Professional Administrator

This user role is assigned to administrators who will configure the Inxmail Professional for Microsoft Dynamics CRM 2011 Connector. This allows you to configure Inxmail Professional and assign attribute assignments (see *Inxmail Professional Configuration*, page 14).

Inxmail Professional administrators do **not** additionally have the rights of Inxmail Professional users.

## 5.3 Inxmail Professional Synchronisation

This user role is required for the Microsoft Dynamics CRM 2011 user account under which the transfer of recipient reactions takes place.

This user role only contains the rights required by the user account. It does **not** contain the right to delete data records.

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Publisher:	Inxmail GmbH
Mailing Address	Wentzingerstr. 17, 79103 Freiburg, Germany
Telephone:	(+49-761) 296979-0
Fax:	(+49-761) 296979-9
Email:	<a href="mailto:info@inxmail.de">info@inxmail.de</a>
Website:	<a href="http://www.inxmail.de">www.inxmail.de</a>
Author:	Inxmail GmbH

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