

# Inxmail Professional

Integration for professional e-mail marketing





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### Disclaimer

The accuracy of the content in this manual is not guaranteed. Notification of errors would be appreciated.

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# 1 Introduction

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With the integration of CAS genesisWorld and Inxmail, the **Inxmail** module offers professional e-mail marketing based on existing and qualified addresses from CAS genesisWorld.

The CAS genesisWorld database is used to send mailings so that all departments across the company always use the same customer data. To this end, the addresses from CAS genesisWorld are grouped in distribution lists and the respective distribution lists are transferred to Inxmail.

In Inxmail, you can then access the address data as mailing lists and create mailings without needing programming skills, personalize the individual e-mails, and send them to select address groups.

After sending, address-specific data and information on incorrect e-mail addresses, subscriptions, unsubscriptions, and the sent mailing are transferred back to CAS genesisWorld.

Moreover, a data record for the respective Inxmail mailing is automatically created in CAS genesisWorld. In this data record, you can find a preview of the sent mailing. The data record of the Inxmail mailing is automatically linked with the corresponding distribution list as well as the contacted addresses. You can find a list of all sent Inxmail mailings in the distribution list data record in CAS genesisWorld.

To monitor the success of the mailing, Inxmail allows you to display and analyze statistical campaign data, for example, click-through rates and opening rates.

## Topics of this chapter

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## Your benefits at a glance

- Easily create HTML e-mails without programming knowledge
- Customize the content of mailings
- Automatically check content and structure before sending out the mailing to ensure the best outcome
- Profit from high sending rates without putting too much load on the CAS genesisWorld Application Server
- Monitor the success of your mailings with statistical analyses in Inxmail
- Manage e-mail bounces

**Note**

The documentation of the integration of CAS genesisWorld and Inxmail only describes the respective functions in CAS genesisWorld and direct interfaces with Inxmail. The functions of Inxmail will not be described in detail in this documentation. For more information, contact the Inxmail GmbH or consult the respective Inxmail documentation.

**Tip**

When using the **Inxmail** module in combination with other modules, you may have to consider certain specific characteristics. You can find more information in the following online help: [Working with several modules](#).

## 1.1 What's new?

As of CAS genesisWorld version x14.1.0, the synchronization with Inxmail is based on the **OpenSync** framework. Thus, the necessary settings and the integration's operating principles differ in some ways.

**Note**

Before you update to the new version, we, therefore, recommend you ensure that the access data for the Inxmail Rest API is available.

**Tip**

As an administrator, you can find more information on the settings necessary after an update in the following chapter: "[Installation and setup](#)", page 62.

Version & client	Role
x15.1.8 all clients	<ul style="list-style-type: none"> <li>■ Administrators can now define in which field in the address data record the e-mail address of new recipients is to be entered. You can find more information in the following section: "<a href="#">Testing an e-mail address for new addresses</a>", page 67.</li> <li>■ Administrators can now change the name of the Inxmail tenant if necessary. You can find more information in the following section: "<a href="#">Renaming the Inxmail tenant</a>", page 65.</li> </ul>

Version & client	Role
x14.1.11 all clients	<ul style="list-style-type: none"> <li>■ We have updated the synchronization with Inxmail so that you can remove addresses from CAS genesisWorld distribution lists, as well. If an address is removed from a distribution list in CAS genesisWorld, the corresponding recipient is also removed from the corresponding list in Inxmail and is no longer unsubscribed as before. Unsubscribing in CAS genesisWorld is no longer possible. You can find more information in the following chapters: <a href="#">"Removing addresses"</a>, page 21 and <a href="#">"Removing contacts"</a>, page 46.</li> <li>■ You can now directly create e-mail campaigns based on templates with Inxmail Xperience. You can find more information in the following sections: <a href="#">"Inxmail New Experience"</a>, page 17 and <a href="#">"Inxmail New Experience: Mailing from template"</a>, page 47.</li> </ul>
x14.1.9 all clients	<p>For Inxmail distribution lists, CAS genesisWorld defines which contact e-mail address is used, for example, <b>Default</b> or <b>Business</b>.</p> <p>If an address is added to a distribution list by synchronization and a different type is used in the distribution list, this address will be marked in the distribution list.</p> <p>If the address is edited and the e-mail address used is entered in the selected field in the distribution list, the marking no longer valid is removed from the distribution list.</p> <p>You can find more information in the following section: <a href="#">"Selecting the e-mail address field"</a>, page 28.</p>
x14.1.8 all clients	<p>We have also released deploying Inxmail New Xperience in combination with Inxmail Professional and Inxmail Synchronization for CAS genesisWorld as of this version.</p> <p>You can find more information in the following section: <a href="#">"Inxmail New Experience"</a>, page 17.</p> <p><b>Note</b></p> <p>Administrators need to re-enter the separate logon parameters for Inxmail New Xperience. You can find more information in the following section: <a href="#">"Inxmail New Xperience tab"</a>, page 70.</p>

Version & client	Role
x14.1.4 desktop client	<p>You can view the click behavior for an already sent Inxmail e-mail campaign archived in CAS genesisWorld. For contacts who have granted <b>Permission for tracking</b>, it is possible to display which links in the e-mail campaign the contacts clicked on within the context of the e-mail campaign.</p> <p>You can find more information in the following sections: "<a href="#">Permission for tracking</a>", page 36 and "<a href="#">Inxmail analysis tab</a>", page 53.</p>
x14.1.4 all clients	<p>The time between two synchronization runs has been shortened from 10 to 3 minutes.</p>
x14.1.3 desktop client	<p>In the <b>General</b> tab for a distribution list of the <b>Inxmail</b> distribution list type displays all recipient addresses even for distribution lists in the <b>Closed</b> distribution list status.</p>
x14.1.3 web client	<p>We have extended the functions of distribution lists in CAS genesis-World Web:</p> <ul style="list-style-type: none"> <li>■ They can now create new Inxmail distribution lists in CAS genesis-World Web. You can find more information in the following section: "<a href="#">Creating Inxmail distribution lists</a>", page 40.</li> <li>■ The <b>Address status</b> tab is now displayed with a detailed view of the recipient addresses in the distribution list. You can find more information in the following section: "<a href="#">Address status tab in CAS genesisWorld Web</a>", page 48.</li> <li>■ The validity can also be customized in the contact in CAS genesis-World Web. To this end for authorized users, there is the <b>Inxmail</b> block for contacts. You can find more information in the following section: "<a href="#">Locking e-mail addresses in CAS genesisWorld Web</a>", page 49.</li> </ul> <p><b>Note</b></p> <p>In CAS genesisWorld Web you will not be able to check the contacts of a distribution list (that is whether the e-mail address exists or is correct).</p> <p>You can find more information in the following sections: "<a href="#">Inxmail in CAS genesisWorld Web</a>".</p>

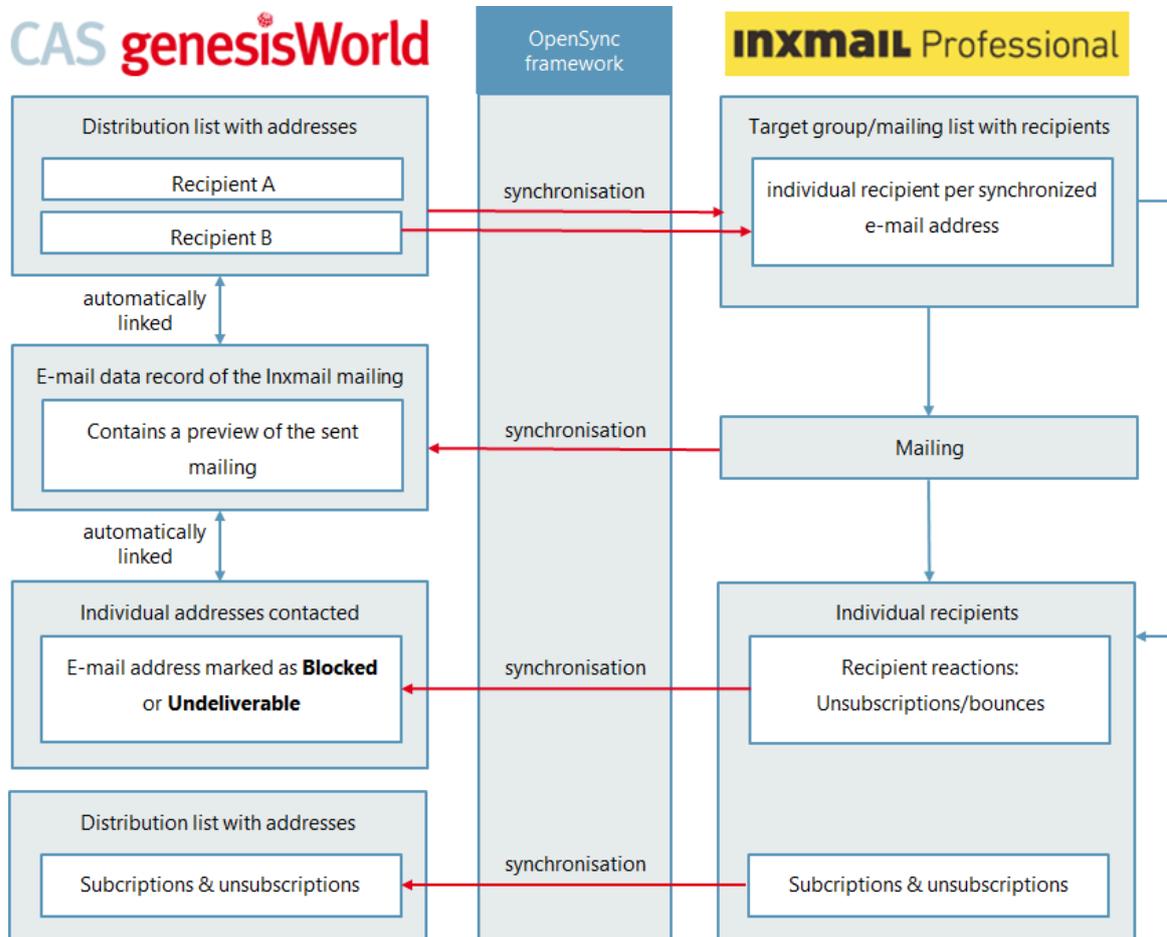
Version & client	Role
x14.1.0 all clients	As of CAS genesisWorld x14.1.0, the synchronization with Inxmail is based on the <a href="#">OpenSync</a> framework. Further information on the repercussions of this change can be found in the following table:

## Differences between Inxmail x13 and Inxmail as of CAS genesisWorld x14.1.0

Inxmail x13	Inxmail x14
<p>The synchronization between CAS genesisWorld and Inxmail Professional runs using a synchronization service that is set up on a specific CAS genesisWorld Application Server in the Management Console. Changes on the Inxmail Professional server are queried in pre-defined time intervals by the entered CAS genesisWorld Application Server.</p> <p>Administrators define custom synchronization intervals. You can manually transfer individual distribution lists to Inxmail Professional. In the <b>Last synchronization</b> field, you can review when a distribution list has last been updated.</p>	<p>The Synchronisation between CAS genesisWorld and Inxmail Professional runs using the <a href="#">OpenSync</a> service.</p> <p>The synchronization automatically runs every 3 minutes and all changes to the addresses in distribution lists are transferred. In the <b>Last synchronization</b> field, you can review when a distribution list was last updated.</p> <p>You can find more information in the following chapters: "<a href="#">Synchronization with Inxmail</a>", page 50 and "<a href="#">General tab: special fields &amp; functions</a>", page 23.</p>
Users can manually transfer individual distribution lists and the addresses included in them to Inxmail Professional.	Users currently cannot manually transfer addresses.
If you remove addresses from a distribution list in CAS genesisWorld, the corresponding recipient is permanently removed from the distribution list or list both in CAS genesisWorld and in Inxmail Professional.	If you remove addresses from a distribution list in CAS genesisWorld, the removal corresponds to unsubscribing the recipient from the distribution list. This means that if an address has been removed from the distribution list, it will be marked with the <b>Unsubscribed</b> status in the distribution list after the next synchronization. You can find more information in the following chapter: " <a href="#">Unsubscriptions</a> ", page 58.

Inxmail x13	Inxmail x14
<p>You define how CAS genesisWorld deals with new subscribers from Inxmail Professional and recipients unknown in CAS genesisWorld under <b>Logons via Inxmail</b> on the <b>Inxmail</b> tab of the respective distribution list. The settings you define in this area influence the processing of subscriptions to CAS genesisWorld distribution lists.</p>	<p>You can no longer define for individual distribution lists how new addresses in Inxmail are processed in CAS genesisWorld.</p> <p>All addresses that are newly added to the synchronized address list in Inxmail are processed the same in CAS genesisWorld.</p> <p>You can find more information in the following chapter: "<a href="#">New addresses from Inxmail Professional</a>", page 33.</p>
<p>The <b>All</b> mailing list is used for global subscriptions and unsubscriptions. The mailing list is automatically created in Inxmail Professional if you work with the CAS genesisWorld integration.</p>	<p>If you were working with the <b>Inxmail</b> module before CAS genesisWorld version x14.1.0, we recommend creating and using a new mailing list as the synchronized address list. Do not use the <b>All</b> mailing list that is already available.</p>
<p>Addresses were marked as <b>Undeliverable</b> if they were not transferred to Inxmail Professional due to incorrect e-mail addresses.</p>	<p>All addresses that have been identified as hard bounces after sending an e-mail campaign in Inxmail are marked with the <b>Undeliverable</b> status. You can find more information in the following chapter: "<a href="#">Returns or bounces</a>", page 54.</p>

## 1.2 Process and workflow



### Selecting and synchronizing addresses

You select the desired recipient addresses in CAS genesisWorld using a distribution list of the **Inxmail** type. For this purpose, you add all addresses you want to target with your mailing to the distribution list.

As soon as you set the distribution list to **Active**, a new mailing list is created in Inxmail Professional. In this new list, the addresses transferred from the distribution list are available as recipients.

The mailing list contains the address fields which have been set in CAS genesisWorld.

You can find more information in the following chapter: "[Distribution lists in CAS genesis-World](#)", page 18.

**Note**

The **E-mail address field** you have selected as the recipient address must be filled in and unique in each address.

If the selected field is not completed in the addresses of a distribution list, the corresponding addresses are not transferred to Inxmail.

## Creating and sending mailings

You create the contents of a mailing as well as test and send the mailing with Inxmail.

## Subscriptions, unsubscriptions, and bounces

You can find the information on subscriptions, unsubscriptions, and bounces transferred from Inxmail in the distribution list data record.

Incorrect e-mail addresses are automatically marked as **Undeliverable** in the address data record.

Unsubscriptions from individual distribution lists are recorded on the **Address status** or the **General** tab of the distribution list.

Unsubscriptions from individual distribution lists are registered and displayed on the **Address status** tab of the respective distribution list. If a recipient unsubscribes from all distribution lists with a global unsubscription, that is, no longer wants to be contacted by mailings to the respective address, the address is automatically marked as **Blocked**.

You can find more information in the following chapters: "[Subscriptions and unsubscriptions](#)", page 56 and "[Returns or bounces](#)", page 54.

## Inxmail mailings in CAS genesisWorld

After sending, a new e-mail data record is created in CAS genesisWorld for each Inxmail mailing sent to a corresponding distribution list.

In this data record, you can find a preview of the sent mailing.

The newly created e-mail data records of the Inxmail mailings are automatically linked with the addresses in CAS genesisWorld that have received the mailing. The e-mail is also linked with the corresponding distribution list and displayed in a list on the **Inxmail mailings** tab of the distribution list.

You can find more information in the following chapter: "[Inxmail mailings in CAS genesisWorld](#)", page 52.

**Note**

If an address has not received the mailing, for example, because of an incorrect e-mail address, the corresponding address data record is not linked with the Inxmail mailing data record.

## Continue working with addresses in CAS genesisWorld

As address data is synchronized from Inxmail to CAS genesisWorld, you can continue working with new address data records and new recipient information from Inxmail in CAS genesisWorld.

Thus, you can, for example, create opportunities for new customers, plan appointments with contact persons, or organize projects.

If the e-mail address of a recipient can be found in exactly one address data record in CAS genesisWorld, the corresponding data record is enriched with information from Inxmail. This means that empty fields in the CAS genesisWorld data record are completed with values from Inxmail, but existing values are not overwritten. Thus, CAS genesisWorld remains the leading system for address management.

If the e-mail address of a recipient can not be uniquely attributed to one address data record in CAS genesisWorld but can be found in multiple addresses, a new address data record is created for this recipient.

The corresponding addresses can then be sorted and filtered in views in CAS genesisWorld.

You can find more information on how to work with more data record types in CAS genesisWorld in the [CAS genesisWorld Web online help](#) or the [Online help for the desktop client: for users](#) of the desktop client.

### Tip

Administrators can define automatic follow-up actions for changed addresses using the notification and action service. You can find more information in the following chapter: "[Setting up the notification and action service](#)", page 72.

## 1.3 Which data are synchronized

During synchronization, various data is transmitted from CAS genesisWorld to Inxmail and back again.

### Tip

You can find more information on the synchronization interval in the following chapter: "[Synchronization with Inxmail](#)", page 50.

## From CAS genesisWorld to Inxmail

Addresses are grouped in distribution lists. The addresses of the distribution list are transferred to Inxmail.

In the process, specific address fields from CAS genesisWorld are transferred. The administrator defines which fields are transferred. At least the e-mail address has to be transferred.

**Tip**

If you want to know more about which fields are included in the synchronization in your company, please contact your administrator.

## From Inmail to CAS genesisWorld

Inxmail transfers the following data to CAS genesisWorld.

Unsubscriptions	<p>Recipients of a mailing can unsubscribe from the mailing list. Unsubscriptions are transmitted to CAS genesisWorld and the respective address is marked as <b>Unsubscribed</b> on the <b>Address status</b> tab of the distribution list. You can also display unsubscriptions in the desktop client on the <b>General</b> tab of the distribution list by using the <b>Unsubscriptions</b> filter.</p> <p>If a recipient has unsubscribed themselves from all distribution lists with a global deregistration, the recipient is marked as <b>Blocked</b> in the corresponding address data record. The <b>Blocked</b> mark can be found in the <b>Contact data</b> on the <b>General</b> tab of the address.</p> <p>You can find more information in the following chapter: "<b>Unsubscriptions</b>", page 58.</p>
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Subscriptions	<p>As soon as a recipient is added to the dedicated Inxmail list in Inxmail, the respective recipient is included in the synchronization set. At the same time, subscriptions to specific lists or synchronized distribution lists are transferred to CAS genesisWorld, and the corresponding addresses are added to the distribution list data record as recipients.</p> <p>If no address is available in CAS genesisWorld for the recipient, an individual contact is created and filled with field values from Inxmail.</p> <p>If the e-mail address of a recipient can be found in exactly one address data record in CAS genesisWorld, the corresponding data record is enriched with information from Inxmail. This means that empty fields in the CAS genesisWorld data record are completed with values from Inxmail, but existing values are not overwritten. Thus, CAS genesisWorld remains the leading system for address management.</p> <p>If the e-mail address of a recipient can not be uniquely attributed to one address data record in CAS genesisWorld but can be found in multiple addresses, a new address data record is created for this recipient.</p> <p>You can find more information in the following chapters: <a href="#">"Subscriptions"</a>, page 56 and <a href="#">"Address status tab"</a>, page 30.</p> <p><b>Note</b></p> <p>Your administrator defines which information and field values are transferred from Inxmail to CAS genesisWorld. Please contact your administrator for more information.</p>
Hard bounces	<p>If e-mails have not been delivered due to incorrect e-mail addresses, those e-mail addresses are marked as <b>Undeliverable</b> in CAS genesisWorld.</p> <p>If an e-mail address has been marked as <b>Undeliverable</b>, it can no longer be used for mailings in Inxmail. To be able to use the respective addresses again, the incorrect e-mail addresses must be corrected in the address data record.</p> <p>You can find more information in the following chapter: <a href="#">"Returns or bounces"</a>, page 54.</p>

Data on sent mailings	<p>An e-mail data record is created for each sent Inxmail mailing in CAS genesisWorld.</p> <p>The Inxmail mailing is automatically linked with the corresponding distribution list as well as the addresses contacted by the distribution list.</p> <p>In the e-mail data record, you can find a preview of the mailing created in Inxmail.</p> <p>You can find more information in the following chapter: "<a href="#">Inxmail mailings in CAS genesisWorld</a>", page 52.</p>
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### Note

If you change field values from addresses in CAS genesisWorld in recipients in Inxmail, these changes are not transferred to CAS genesisWorld as CAS genesisWorld is the leading system when working with addresses.

In compliance with the GDPR (General Data Protection Regulation), we recommend you use a double-opt-in process for the subscription to distribution lists in Inxmail. Recipients must explicitly confirm each subscription by clicking a confirmation link in a double-opt-in confirmation mailing.

The documentation of the integration of CAS genesisWorld and Inxmail only describes the respective functions in CAS genesisWorld and direct interfaces with Inxmail. The functions of Inxmail will not be described in detail in this documentation. For more information, contact the Inxmail GmbH or consult the respective Inxmail documentation.

## 1.4 Versions and licenses

The functions described in this user guide are valid with CAS genesisWorld as of version x14.1.8. For more detailed information on required or released versions as well as known restrictions, see the latest release notes at [hilfe.cas.de](http://hilfe.cas.de)

To be able to use the Inxmail integration in CAS genesisWorld, the **OpenSync** service must be started in the CAS genesisWorld Server Manager.

The following requirements are necessary for the Inxmail integration.

- Access to Inxmail Professional
- The Inxmail Rest API has to be unlocked and the necessary access data must be available.
- The Inxmail server should be directly accessible by the CAS genesisWorld server via http, or a proxy server.

**Note**

In some cases, firewall settings need to be changed. Please contact your administrator for more information.

## 1.5 Inxmail New Experience

We have also released deploying Inxmail New Xperience in combination with Inxmail Professional and Inxmail Synchronization for CAS genesisWorld.

Inxmail New Xperience is the new editing module for Inxmail Professional for the design of creative and attractive e-mail campaigns. As usual, you can personalize e-mail campaigns in Inxmail New Xperience. E-mail campaigns are sent via Inxmail Professional.

When editing an e-mail campaign in Inxmail New Xperience, select the e-mail campaign list you wish to use from Inxmail Professional in the **Synchronization** area.

If a synchronization to Inxmail Professional for an e-mail campaign has been configured, then the e-mail campaign can be personalized via the attributes of the recipients by using suitable mail merge fields. The desired fields must be synchronized accordingly between Inxmail and CAS genesisWorld.

**Note**

The documentation of the functions of Inxmail New Xperience in combination with Inxmail Professional and CAS genesisWorld describes only the direct interfaces to CAS genesisWorld. The functions in Inxmail New Xperience will not be described in detail here. For more information, contact the Inxmail GmbH or consult the Inxmail documentation.

In the following chapters you will find information on Inxmail New Xperience:

["Inxmail New Experience: Mailing from template", page 47](#)

["Logon parameter for the Inxmail server", page 64](#)

**Tip**

If you are a user and want to know more about which fields are included in the synchronization between Inxmail Professional and CAS genesisWorld, please contact your administrator.

As an administrator, you can find more information on setting up the synchronization in chapter ["Management Console settings", page 63](#).

## 2 Distribution lists in CAS genesisWorld

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The first step in preparing a mailing in CAS genesisWorld is selecting the desired addresses and creating an Inxmail distribution list.

The **Distribution list status** is used to control the automatic synchronization of the distribution list to Inxmail.

The **Inxmail** tab is automatically added to a distribution list of the **Inxmail** type. On this tab, you can find information on the corresponding list in Inxmail and select the **E-mail address** field you want to use.

In the CAS genesisWorld desktop client, you can directly access Inxmail via the **Inxmail** dropdown list. You can also check the addresses added to the distribution list or close the opened distribution list.

The **Inxmail mailings** tab appears in the distribution list data record as soon as you have sent a mailing to the corresponding list in Inxmail.

### Example

You can only select the **Inxmail** distribution list type if you have received the corresponding rights from the administrator. Please contact your administrator for more information.

Without the respective rights, you do not have access to the Inxmail-specific distribution list data.

We recommend keeping Inxmail closed while working with distribution lists in CAS genesisWorld that are synchronized with Inxmail.

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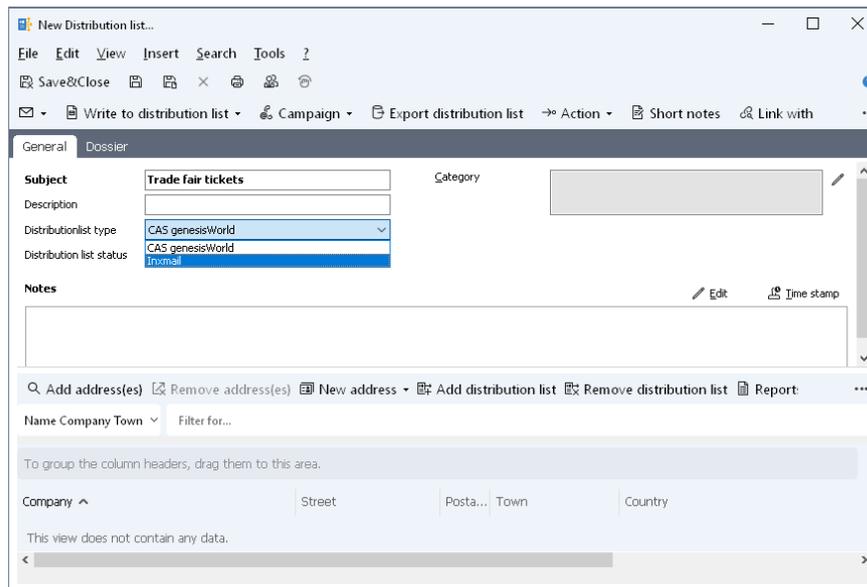
### 2.1 Create distribution list

Before addresses from CAS genesisWorld are transferred to Inxmail, you first need to create a corresponding distribution list in CAS genesisWorld and add the desired addresses.

After creating them, you can add addresses in the lower part of the window. You can also remove added addresses from the distribution list here. You can find more information in the following chapters:

"Adding addresses", page 20

"Removing addresses", page 21



## Create distribution list

1.  Click **New** and select the **Distribution list** data record type.
  2. Using the toolbar functions, you can add or remove addresses.
  3. Select the **Inxmail** value in the **Distribution list type** drop-down list.
- ✓ The **Inxmail** tab is added to the distribution list window. The **Inxmail** drop-down list is now displayed in the toolbar of the window.

## 2.1.1 Adding addresses

Name	Company	Town	Street	Postal code	Country
	Birbaum & Hempel UK	London	50 Princes Gate, Exhibition Road	SW7 2PH	United Kingdom
	Birbaum & Hempel UK	London	50 Princes Gate, Exhibition Road	SW7 2PH	United Kingdom
	Birbaum & Hempel UK	London	50 Princes Gate, Exhibition Road	SW7 2PH	United Kingdom

You can add new addresses to a distribution list at any time. You can add individual addresses or whole distribution lists to the currently open distribution list.

You will not be able to add addresses or distribution lists if the distribution list status has been set to **Closed**. You can find more information in the following chapter: "[Distribution list status](#)".

### Note

A distribution list is a collection of addresses. Distribution lists are their own data record type and can thus be linked with other data records. The addresses that have been added to the distribution list are not automatically linked with the distribution list data record.

### Adding one or more addresses

1. Open a distribution list.
2. Click **Add address(es)** in the lower part of the window.
- ✓ The **Search: Addresses** window opens.

### Tip

If SmartSearch is activated in your company, the **Add address(es)** field automatically turns into a search field, allowing you to search directly for a specific address.

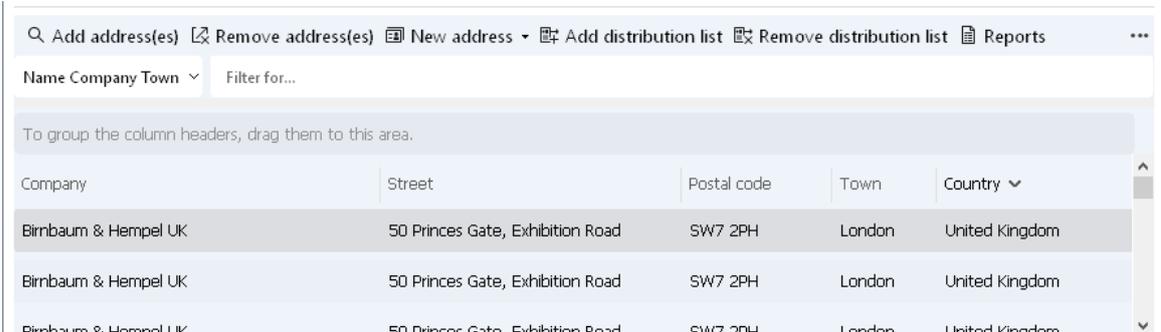
3. Search for the desired address and select the respective data record from the search results.
4. Click **Apply & next** to search for more addresses and select them or **Apply & close** to only adopt the selected address to the distribution list.
- ✓ The added address is displayed on the **General** tab in the address list and on the **Address status** tab.

5. **Save** the distribution list data record.

### Add distribution list

1. Open a distribution list.
2. Click **Add distribution list** in the lower area of the window.
- ✓ The **Add addresses of the selected distribution list to the current distribution list** window opens.
3. Select the desired distribution lists.
4. Click **OK**.
- ✓ The addresses of the selected distribution lists are added to the addresses of the opened distribution list and are displayed on the **General** tab in the address list as well as on the **Address status** tab.
5. **Save** the distribution list data record.

## 2.1.2 Removing addresses



Company	Street	Postal code	Town	Country
Birbaum & Hempel UK	50 Princes Gate, Exhibition Road	SW7 2PH	London	United Kingdom
Birbaum & Hempel UK	50 Princes Gate, Exhibition Road	SW7 2PH	London	United Kingdom
Birbaum & Hempel UK	50 Princes Gate, Exhibition Road	SW7 2PH	London	United Kingdom

You can remove the addresses of a distribution list at any time. You can remove individual addresses or whole distribution lists from the currently open distribution list.

You will not be able to remove addresses or distribution lists if the distribution list status has been set to **Closed**. You can find more information in the following chapter: "[Distribution list status](#)".

If an address is removed from a distribution list in CAS genesisWorld, the corresponding recipient is also removed from the corresponding list in Inxmail.

**Note**

A distribution list is a collection of addresses. Distribution lists are their own data record type and can thus be linked with other data records. The addresses that have been added to the distribution list are not automatically linked with the distribution list data record.

## Removing an address(es)

1. Open a distribution list.
2. Select a desired address from the address list in the lower area of the window.
3. Click Remove address(es).
- ✓ The selected address is removed from the distribution list.
4. **Save** the distribution list data record.

## Remove distribution list

1. Open a distribution list.
2. Click **Remove distribution list** in the lower area of the window.
- ✓ The **Remove addresses of the selected distribution list from the current distribution list** window opens.
3. Select the desired distribution lists.
4. Click **OK**.
- ✓ The addresses of the selected distribution lists are removed from the addresses of the opened distribution list.
5. **Save** the distribution list data record.

## 2.2 Distribution list status

Using the **Distribution list status** field, you control whether a distribution list is transferred to Inxmail in the defined synchronization interval.

The **Distribution list status** field can contain the following values.

Status	Description
In preparation	<p><b>In preparation</b> is a distribution list that has not yet been transferred to Inxmail. If necessary, add further addresses or complete the data record with more information.</p> <p>You can find more information in the following chapter: "<a href="#">Create distribution list</a>", page 18.</p>
Active	<p><b>Active</b> indicates that the distribution list is in use and transferred to Inxmail.</p> <p>You can find more information in the following chapter: "<a href="#">Synchronization with Inxmail</a>", page 50.</p>
Closed	<p>A distribution list is <b>Closed</b> if it is no longer in use and must not be edited. Closed distribution lists are no longer synchronized with Inxmail.</p> <p>Closed distribution lists can be reset to the <b>Active</b> status. However, you can no longer set the status to <b>In preparation</b>.</p> <p>If the distribution list status has been set to <b>Closed</b> in CAS genesisWorld, the mailing list in Inxmail is not closed and can still be used in Inxmail Professional.</p> <p>If you reset the distribution list status to <b>Active</b>, the addresses of the respective distribution list are again transferred to the still existing mailing list in Inxmail.</p> <p>If you delete a mailing list in Inxmail, the distribution list status is automatically set to <b>Closed</b> in CAS genesisWorld.</p> <p><b>Note</b></p> <p>If you reset the distribution list to <b>Active</b> at a later time and have continued using the mailing list in Inxmail Professional despite the distribution list being closed, data inconsistencies between the CAS genesisWorld distribution list and the mailing list in Inxmail can occur.</p>

## 2.3 General tab: special fields & functions

On the **General** tab of distribution list data records, you can find i.a. the following special fields and functions.

## Filter conditions in the list of addresses

You can use predefined filter conditions in the list of addresses added to the distribution list to display certain types of recipients.

To do so, select the desired filter condition from the drop-down list.



The **Number of addresses in this list** is displayed on the status bar in the data record window.

Filter condition	Description
<b>Recipient</b>	<p>If you select <b>Recipient</b> in the drop-down list, all addresses in the distribution list that are included in the transfer to Inxmail are displayed.</p> <p>You can find the usual functions for distribution lists in the toolbar above the list.</p>
<b>Unsubscriptions</b>	<p>If you select <b>Unsubscriptions</b> in the drop-down list, all unsubscribed recipients are displayed.</p> <p>If you want to subscribe one or more recipients again, select the corresponding addresses in the list of <b>Unsubscriptions</b> and click <b>Add again</b>.</p> <p>If an address is removed from a distribution list, the corresponding recipient is also removed from the corresponding list in Inxmail.</p> <p>You can find more information in the following chapter: "<b>Unsubscriptions</b>", page 58.</p>

## Last used & synchronization

After the initial synchronization or the first use of the distribution list, the following fields are displayed on the **General** tab of the distribution list.

Field	Description
Last used	<p>In the <b>Last used</b> field, you can view when the distribution list was last used.</p> <p>The date and time of the last sent e-mail campaign in Inxmail is automatically entered into the field.</p> <p>If the distribution list has not yet been used, the field is not displayed.</p>
Last synchronization	<p>In the <b>Last synchronization</b> field, you can view when the last synchronization with Inxmail has taken place.</p> <p>The date and time of the last synchronization is automatically entered into the field. Values are automatically entered with each synchronization whether the address data has been changed or remains the same.</p> <p>If the distribution list has not yet been synchronized, the field is not displayed.</p> <p><b>Note</b></p> <p>Please note that the field does not automatically update if the window or list is opened. If you want to update the field, you may need to close the view or the distribution list and reopen it again.</p>

## 2.4 Inxmail tab

The **Inxmail** tab is automatically added to a distribution list of the **Inxmail** type. On this tab, you can find information on the corresponding list in Inxmail and select the **E-mail address** field you want to use.

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### 2.4.1 External list name

The **External list name** field displays the name of the distribution list.

The name comprises the name of the CAS genesisWorld distribution list and the date.

#### Note

You cannot edit the **External list name** field. The field is automatically filled in after the first synchronization.

The **Subject** field on the **General** tab of the distribution list can still be edited. Thus, the name of the distribution list in CAS genesisWorld and the external list name can differ.

### 2.4.2 Status

The **Status** field is automatically completed, cannot be edited in CAS genesisWorld, and can contain the following values.

Status	Description
In preparation	The distribution list has not yet been transferred to Inxmail.

Status	Description
At Inxmail	<p>The distribution list has been transferred to Inxmail.</p> <p><b>Tip</b></p> <p>You can find more information on the synchronization interval in the following chapter: "<a href="#">Synchronization with Inxmail</a>", page 50.</p>
To delete	<p>If you select <b>Close distribution list</b> in the Inxmail drop-down list, the status is set to <b>To delete</b> until the next synchronization. With the next synchronization, the corresponding mailing list in Inxmail is deleted and the status of the distribution list is automatically set to <b>Terminated</b>.</p> <p><b>Note</b></p> <p>Distribution lists with the <b>To delete</b> status can no longer be edited or reset, for example, to the <b>Active</b> distribution list status. You can only reset the distribution list status to <b>Active</b> if the corresponding mailing list in Inxmail has been deleted and the status has automatically been set to <b>Terminated</b>.</p>
Terminated	<p>A distribution list is terminated if the corresponding mailing list in Inxmail has been deleted. Once terminated, a synchronization is no longer possible.</p> <p>The <b>Terminated</b> status is only visible in the list view as the <b>Inxmail</b> tab is no longer displayed in terminated distribution lists.</p>

### 2.4.3 Sender's and Reply address

In the **Sender's address** and **Reply address** fields, you enter the desired e-mail address in the following format: "**Name**" <**e-mail address**>.

If you do not use this format, you may experience problems with spam filters. **Name** is the part of an e-mail address that is displayed in most e-mail clients. You can leave both the name and quotation marks out if you wish.

Field	Description
<b>Sender's address</b>	The address is displayed as the sender to the recipients of the e-mail. You must enter the sender's address for the distribution list to be synchronized with Inxmail.

Field	Description
Reply address	This e-mail address is used when a recipient clicks <b>Reply</b> in the e-mail they received.

## 2.4.4 Selecting the e-mail address field

To send e-mails with Inxmail, you need exactly one e-mail address per address. In CAS genesisWorld however, addresses can contain multiple e-mail addresses.

In the **E-mail address field** field, you select which field from CAS genesisWorld addresses is used to create recipients in Inxmail. This setting applies to all recipients of the distribution list.

### Note

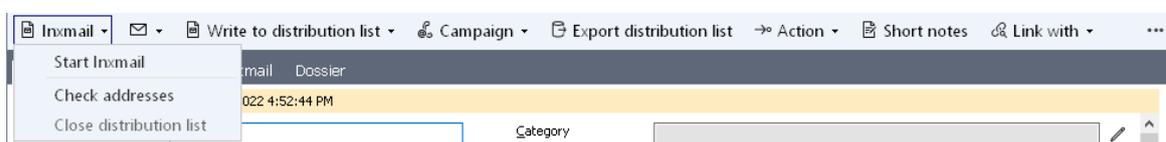
As soon as the addresses of the distribution list have been transferred to Inxmail, you can no longer change the **E-mail address field** field in CAS genesisWorld.

Recipients that subscribe to a distribution list via Inxmail can already be available as an address in CAS genesisWorld. However, they may subscribe with a different e-mail address field. The respective recipients are displayed in green and bold formatting in the distribution list. If the address is edited and the e-mail address used is entered in the selected field in the distribution list, the marking no longer valid is removed from the distribution list.

The e-mail address has to conform to the RFC standard (Request for Comments). This standard determines the format of an e-mail address, for example, where the dots appear. If an e-mail address does not conform to the RFC standard, then it is not transferred to Inxmail Professional and you will not receive an error message.

## 2.5 Inxmail drop-down list

In the CAS genesisWorld desktop client, you can directly access Inxmail via the **Inxmail** dropdown list. You can also check the addresses added to the distribution list or close the opened distribution list.



### Start Inxmail

You can start Inxmail Professional from the opened distribution list data record to send a mailing.

### Start Inxmail

1. Click [Start Inxmail](#) to switch to Inxmail Professional.
2. Create, edit, and send a mailing.

### Check addresses

Using the [Check addresses](#) function, you can check the addresses included in the distribution list for errors and correct them if necessary.

#### Tip

We recommend checking the addresses while the distribution list status is set to **In preparation**. Thus, you can correct the selected addresses before synchronizing the distribution list with Inxmail.

### Check addresses

1. Click [Check addresses](#) to check the addresses added to the distribution list and correct them if required.
2. Follow the steps described in the following chapter: "[Correcting addresses](#)", page 34.

### Close distribution list

If you select [Close distribution list](#) in the Inxmail drop-down list, the status is set to **To delete** until the next synchronization. With the next synchronization, the corresponding mailing list in Inxmail is deleted and the status of the distribution list is automatically set to **Terminated**.

#### Example

We recommend that you close the Inxmail list when closing the distribution list.

Distribution lists with the **To delete** status can no longer be edited or reset, for example, to the **Active** distribution list status. You can only reset the distribution list status to **Active** if the corresponding mailing list in Inxmail has been deleted and the status has automatically been set to **Terminated**.

You can find more information in the following chapter: "[Status](#)", page 26.

### Close distribution list

1. Click **Close distribution list** to close the opened distribution list.

## 2.6 Inxmail mailings tab

The **Inxmail mailings** tab appears in the distribution list data record as soon as you have sent a mailing to the corresponding list in Inxmail.

On the **Inxmail mailings** tab, you can find a list of the Inxmail mailings sent to the distribution list. The corresponding e-mail data records are linked with the distribution list. You can find more information in the following chapter: "[Inxmail mailings in CAS genesisWorld](#)", page 52.

The list of sent mailings is an e-mail list and offers the usual functions for e-mail list views in CAS genesisWorld.

Double-click the desired Inxmail mailing to open the corresponding e-mail data record in a new window.

### Topics of this chapter

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#### 2.6.1 Displaying the preview

To display a preview of a sent Inxmail mailing in the list of the sent mailings, you select the desired data record in the list. The preview is displayed in the lower part of the window.

## 2.7 Address status tab

On the **Address status** tab of the distribution list, you can see which addresses are marked with which status. The following status are displayed.

Status	Description
Recipient	<p>All addresses that can be contacted via the distribution list and transferred to Inxmail are marked with the <b>Recipient</b> status.</p> <p><b>Tip</b></p> <p>The <b>Address status</b> tab in the desktop client does not display subscriptions as <b>Subscription</b>. If recipients have subscribed to a distribution list and have been added to the corresponding distribution list, they are marked with the <b>Recipient</b> status.</p>
Unsubscribed	<p>All addresses that have unsubscribed from the distribution list and must not be contacted are marked with the <b>Unsubscribed</b> status and may not be contacted through the corresponding Inxmail list. You can find more information in the following chapter: "<a href="#">Subscriptions and unsubscriptions</a>", page 56.</p>
Blocked	<p>All addresses that have unsubscribed from all Inxmail lists via a global unsubscription and must not be contacted using any distribution list are marked with the <b>Blocked</b> status. You can find more information in the following chapters: "<a href="#">Subscriptions and unsubscriptions</a>", page 56 and "<a href="#">Manually locking e-mail addresses</a>", page 36</p>
Undeliverable	<p>All addresses that have been identified as hard bounces after sending an e-mail campaign in Inxmail are marked with the <b>Undeliverable</b> status. You can find more information in the following chapter: "<a href="#">Returns or bounces</a>", page 54.</p>

### Displaying addresses with certain status

1. Open the **Address status** tab in the desired distribution list.
  2. Select the desired status from the drop-down list in the upper left area of the window.
- ✓ Only addresses with the selected status are displayed in the list.

### Time of subscription or unsubscription

In the address list, you can view when the respective recipient has subscribed to or unsubscribed from the distribution list.

In the **Subscribed on** column, the date and time of subscription are displayed.

In the **Unsubscribed on** column, the date and time of unsubscription are displayed.

## 3 Addresses in CAS genesisWorld

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In CAS genesisWorld, you can use the available standard functions to work with addresses. You will find more information in the [Online help for the desktop client: for users](#) or the [CAS genesisWorld Web online help](#).

As soon as the **Distribution list status** of a distribution list is set to **Active**, the distribution list is in use and synchronized with Inxmail. You can find more information in the following chapter: "[Distribution list status](#)", page 22.

The addresses in the distribution list are transferred to Inxmail as a mailing list.

The synchronization between CAS genesisWorld and Inxmail automatically runs every 3 minutes. In the process, all changes to the addresses included in the synchronization set are automatically identified and transferred.

You can review the time of the last synchronization of a distribution list in the distribution list data record in the **Last synchronization** field on the **General** tab. You can find more information in the following chapter: "[General tab: special fields & functions](#)", page 23.

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### 3.1 Addresses in CAS genesisWorld vs. recipients in Inxmail

As soon as a recipient is added to the **Synchronized address list** in Inxmail, the respective recipient is included in the synchronization set, which is the set of addresses that is synchronized between both systems.

Please note that an address data record in CAS genesisWorld does not correspond with a recipient in Inxmail.

Addresses in CAS genesisWorld can contain multiple e-mail addresses, for example, in the **E-mail (business)** and **E-mail (private)** fields.

In Inxmail, each e-mail address is available as one unique recipient. This means that an address from CAS genesisWorld can be represented by multiple recipients in Inxmail if multiple e-mail addresses of an address data record are included in the synchronization with Inxmail.

If multiple CAS genesisWorld addresses with identical e-mail addresses are synchronized, only one recipient is created in Inxmail for the e-mail address. In this case, the contact data of the recipient is taken from the CAS genesisWorld address that has last been edited.

### 3.2 New addresses from Inxmail Professional

As soon as a recipient is added to the **Synchronized address list** in Inxmail, the respective recipient is included in the synchronization set, which is the set of addresses that is synchronized between both systems.

If no address is available in CAS genesisWorld for the recipient, an individual contact is created and filled with field values from Inxmail. The **First contact** field automatically contains the value **Inxmail**. Your administrator defines in which field of the e-mail address in the address data record the e-mail address of a new recipient is entered when creating a new address.

If the e-mail address of a recipient can be found in exactly one address data record in CAS genesisWorld, the corresponding data record is enriched with information from Inxmail. This means that empty fields in the CAS genesisWorld data record are completed with values from Inxmail, but existing values are not overwritten. Thus, CAS genesisWorld remains the leading system for address management.

If the e-mail address of a recipient can not be uniquely attributed to one address data record in CAS genesisWorld but can be found in multiple addresses and can also not uniquely be identified using the first and last name, a new address data record is created for this recipient. The field of the new data record are completed using values from Inxmail. The **First contact** field automatically contains the value **Inxmail**. Your administrator defines in which field of the e-mail address in the address data record the e-mail address of a new recipient is entered when creating a new address.

#### Note

If new recipients subscribe to a distribution list, the described specifications apply to new addresses from Inxmail. You can find more information on subscriptions in the following chapter: "[Subscriptions](#)", page 56.

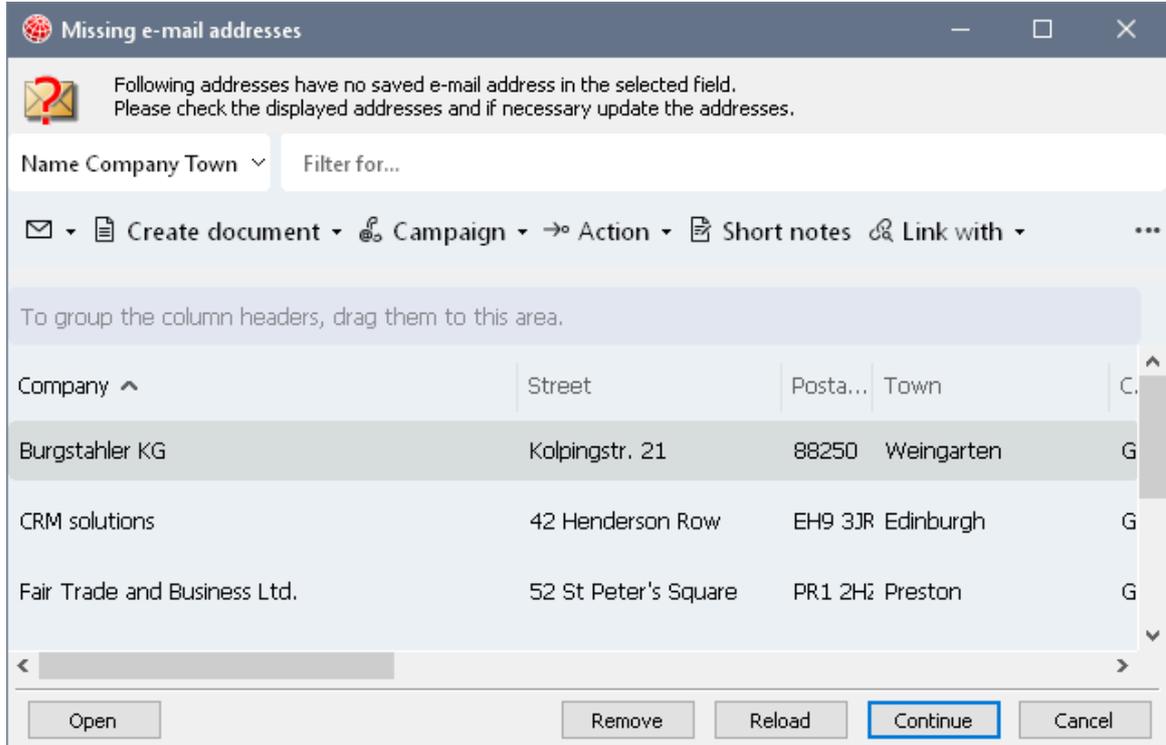
If you want to know in which field the e-mail addresses of new recipients are entered in CAS genesisWorld, please contact your administrator.

If you want to know which Inxmail list is the **Synchronized address list**, please contact your administrator.

Your administrator also defines which information and field values are transferred from Inxmail Professional to CAS genesisWorld.

### 3.3 Correcting addresses

Before you contact a distribution list via Inxmail, we recommend checking and correcting the included addresses. If the recipient addresses contain errors, lists containing the incorrect data records are displayed and you can correct them.



Name of the window	Description
Missing e-mail addresses	The window opens containing a list of those addresses that do not contain an e-mail address in the selected <b>E-Mail address field</b> .
Duplicate e-mail addresses	<p>The window opens containing a list of addresses that have the same e-mail address in the selected <b>E-mail address field</b>.</p> <p>Mailing lists can only contain one e-mail address per recipient.</p> <p>If different addresses contain the same e-mail address, only one e-mail is sent to one address. In this case, the recipient in Inxmail corresponds with the address that was last synchronized from CAS genesisWorld.</p>

Name of the window	Description
<a href="#">Invalid e-mail addresses</a>	The window opens containing a list of addresses that are incorrect or do not conform to the RFC standard (Request for Comments).
<a href="#">Unsubscribed e-mail addresses</a>	The window opens containing a list of addresses that have unsubscribed from all distribution lists or only the respective distribution list.  You can find more information in the following chapter: <a href="#">"Subscriptions and unsubscriptions"</a> , page 56.

### Available buttons

In the lists of the different windows, you can access various buttons and functions.

Button	Description
<a href="#">Open</a>	With this button, you open the desired address data record and make the necessary changes to the corresponding e-mail address.
<a href="#">Reload</a>	With this button, you recheck whether the addresses contain missing, duplicate, or undeliverable e-mail addresses.
<a href="#">Continue</a>	With this button, you continue the address transfer without editing the displayed e-mail addresses.  Unsubscribed recipients and incorrect or missing e-mail addresses are not transmitted to Inxmail Professional. Those recipients whose e-mail addresses are found in more than one address are only transferred once.
<a href="#">Delete</a>	With this button, you unsubscribe the selected recipient from the distribution list. The corresponding address data record is marked as <b>Unsubscribed</b> in the distribution list.  You can find more information in the following chapter: <a href="#">"Subscriptions and unsubscriptions"</a> , page 56.

## 3.4 Changing e-mail addresses

If you change an e-mail address which has already been synchronized with Inxmail in an address data record, the corresponding recipient in Inxmail is retained.

The changed e-mail address is created as a new recipient in Inxmail with the next synchronization run.

### 3.5 Permission for tracking

Recipients grant their permission for tracking and processing of personal data via Inxmail.

You can view whether recipients have actively granted permission for tracking and processing of personal data in the respective address data record.

#### Note

The value in the **Permission for tracking** column cannot be changed, but is automatically transferred from Inxmail to CAS genesisWorld.

#### Procedure

1. Open the desired address data record.
  2. Open the **Distribution list** tab.
- ✓ On the **Distribution list** tab, you see a list of all distribution lists that contain the respective address on the upper pane of the window. In the list, you find the **Permission for tracking** column. You can see whether the recipient has Given or **Not given** the permission for tracking in this column.

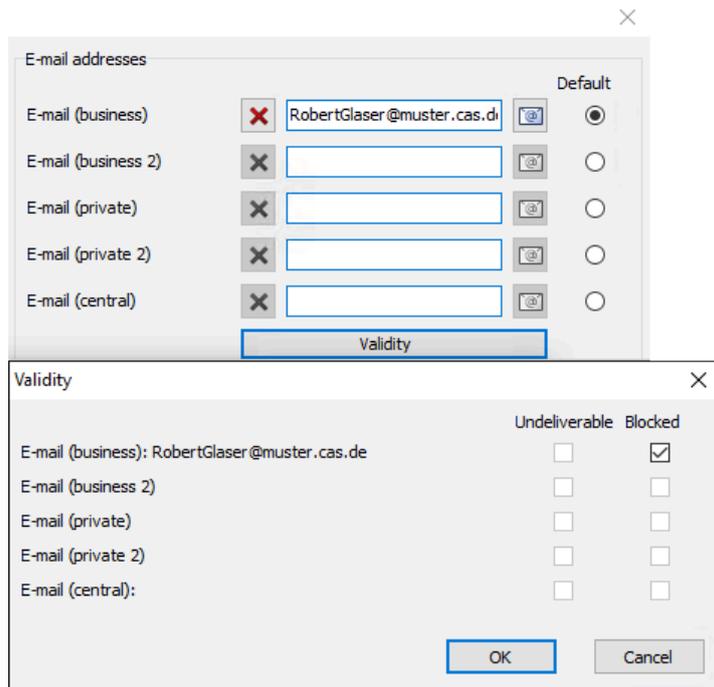
### 3.6 Manually locking e-mail addresses

You can manually lock the e-mail address of a contact data record in CAS genesisWorld. The respective e-mail address is then blocked and can no longer be contacted via mailings from any distribution lists in CAS genesisWorld.

You can find more information on subscriptions and unsubscriptions in the following chapter: "[Subscriptions and unsubscriptions](#)", page 56.

#### Tip

You can also manually lock e-mail addresses in CAS genesisWorld Web. You can find more information in the following chapter: "[Locking e-mail addresses in CAS genesisWorld Web](#)", page 49.



## Procedure

1. Click **Contact data** in an opened address data record.
2. Click the **Validity** button in the **Edit contact data** window.
- ✓ A window opens in which you can see whether the **Blocked** option has been activated for one or several e-mail addresses.
3. Activate the **Blocked** option.
- ✓ The respective e-mail address is unsubscribed from all distribution lists in CAS genesisWorld.
- ✓ With the next synchronization run, the corresponding recipient in Inxmail is also unsubscribed from all lists synchronized with CAS genesisWorld. However, the recipient is not unsubscribed from the synchronized address list and thus remains in the set of synchronized recipients.

## Note

If you want to know which Inxmail list is the **Synchronized address list**, please contact your administrator.

Your administrator also defines which information and field values are transferred from Inxmail Professional to CAS genesisWorld.

### 3.7 Deactivated addresses in Inxmail

You can deactivate addresses in CAS genesisWorld. Deactivated addresses can i.a. no longer be edited and are displayed with a strikethrough in all lists and views.

You can find more information on deactivated addresses on page [CAS genesisWorld Web Online Help: Deactivating contacts](#) or [Online help for the desktop client: Deactivating addresses](#).

Deactivated addresses that are subscribed to CAS genesisWorld distribution lists are transferred as unsubscribed to Inxmail.

If you reactivate the respective address in CAS genesisWorld, the corresponding recipients are recognized as subscribed again in Inxmail.

## 4 Inxmail in CAS genesisWorld Web

You can also access the **Inxmail** module functions in CAS genesisWorld Web.

The procedure when working with the different functions and data record types can differ from the desktop client.

### Tip

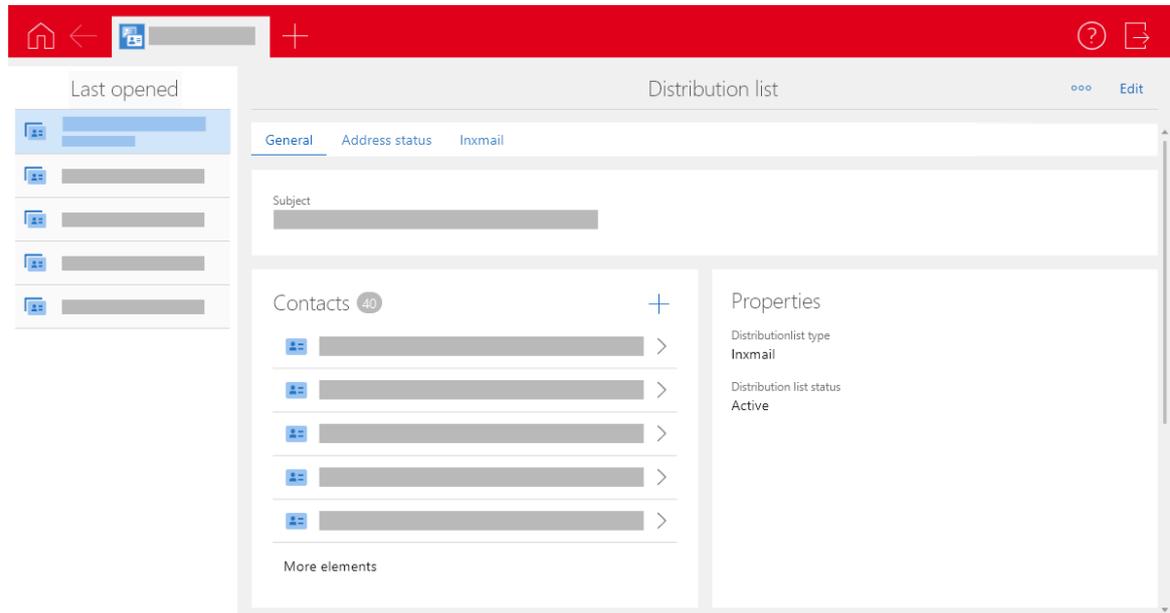
In CAS genesisWorld Web, addresses are called contacts and can be found in the **Contacts** app.

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### 4.1 Inxmail distribution lists in CAS genesisWorld Web

If you use Inxmail, you can also create Inxmail distribution lists in CAS genesisWorld Web.



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### 4.1.1 Creating Inxmail distribution lists

You can create Inxmail distribution lists in both the **Distribution list** app and the **Contacts** app.

- You create an empty distribution list in the **Distribution lists** app.
- You can select the desired contacts and transfer them to the new distribution list in the **Contacts** app.

#### Distribution list app

1. Open the **Distribution lists** app.
2. + Click the button and select **Create Inxmail distribution list**.
3. Complete the desired fields and save your settings.

#### In the Contacts app

1. Open a view or list in the **Contacts** app.
2. Select all the contacts which you want to add to the distribution list.
3. ☰ Open the **action menu**.
4. 📄 Click the button and select **Verteiler > Create Inxmail distribution list**.
- ✓ The **Distribution list** window opens. The contacts you selected previously are already entered.
5. Complete the desired fields and save your settings.

### Inxmail distribution list fields

#### General tab

Field/Block	Description
<b>Subject</b>	The text entered here is displayed in data record lists and is searchable.

**General tab**

Field/Block	Description
Description	The description is displayed in the lists below the subject. Using the description, you can quickly identify the purpose of the distribution list.
Contacts	In the <b>Contacts</b> block, you can add the contacts to your distribution list. You can find more information in the following chapter: <a href="#">"Adding contacts", page 45</a>
Distribution list type	The <b>Distribution list type</b> is automatically completed when creating the data record and cannot be changed. You cannot edit distribution lists of the <b>Evalanche</b> type in CAS genesisWorld Web.
Distribution list status	You can select the distribution list status. <b>In preparation</b> is only available if no other status has been set and saved. If you, for example, select <b>Active</b> and then save the data record, you can no longer return to the <b>In preparation</b> status. If you select <b>Closed</b> and the data record is saved, then you will no longer be able to edit most of the fields.

**Inxmail tab**

Field/Block	Description
External list name	In the <b>External list name</b> field, the name of the distribution list in Inxmail is displayed. The name is generated automatically and comprises the subject and the date. As long as no synchronization with Inxmail has occurred, any changes to the subject are still adopted in the <b>External list name</b> field. After the first synchronization, the value in the <b>External list name</b> field is no longer changed. Thus, the subject entered in CAS genesisWorld and the name of the distribution list in Inxmail can differ.

## Inxmail tab

Field/Block	Description
<p><b>Status</b></p>	<p>The <b>Status</b> field is completed automatically and cannot be edited.</p> <p>The following values are possible:</p> <ul style="list-style-type: none"> <li>■ <b>In preparation</b> The distribution list has not yet been transferred to Inxmail.</li> <li>■ <b>At Inxmail</b> The distribution list has been transferred to Inxmail.</li> <li>■ <b>To delete</b> The <b>To delete</b> status is set after the distribution list has been closed. The corresponding mailing list in Inxmail is deleted with the next synchronization. Distribution lists with the <b>To delete</b> status can no longer be edited.</li> <li>■ <b>Terminated</b> A distribution list is terminated if the corresponding mailing list in Inxmail has been deleted. Once terminated, a synchronization is no longer possible. The <b>Terminated</b> status is only visible in the list view as the <b>Inxmail</b> tab is no longer displayed in terminated distribution lists.</li> </ul>
<p><b>Sender's address</b></p>	<p>This e-mail address is displayed as the sender to the recipients of the e-mail. You must enter the sender's address for the distribution list to be synchronized with Inxmail.</p>
<p><b>Reply address</b></p>	<p>This e-mail address is used when a recipient clicks <b>Reply</b> in the e-mail they received.</p>

**Inxmail tab**

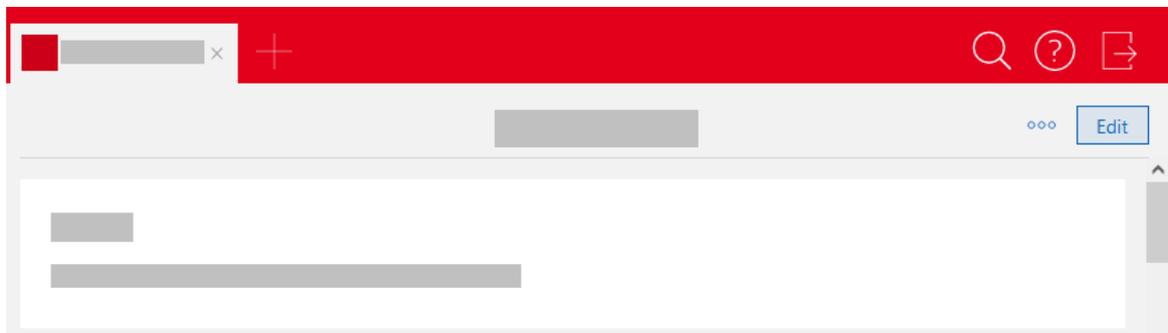
Field/Block	Description
E-mail source	<p>In the e-mail source field, you select the field in the addresses saved in CAS genesisWorld which you want to use as the recipient address for sent e-mails. This setting applies for all recipients of the distribution list.</p> <p>As soon as the recipients of the distribution list have been transferred to Inxmail, you can no longer change the <b>E-mail source</b>.</p> <p><b>Note</b></p> <p>Do not use the <b>E-mail (central)</b> field as the <b>E-mail source</b>.</p>

### 4.1.2 Editing Inxmail distribution lists

You can edit a data record that is already available if you have the necessary rights.

You can find the button for editing a data record in the upper right corner of a data record opened in read mode.

If the button is not available, you may not have the necessary rights to edit the data record.



The same fields are available when editing a data record as when creating a data record.

### 4.1.3 Functions for Inxmail distribution lists

Different functions are available for Inxmail distribution lists in CAS genesisWorld Web. The functions are mostly the same as those available for CAS genesisWorld distribution lists.

**Note**

Some actions can only be performed in the desktop client. These actions include, for example, the **Start Inxmail** and **Check addresses** functions.

## Adding or removing contacts

You add or remove contacts to or from Inxmail distribution lists the same way as to or from CAS genesisWorld distribution lists.

If the **Status** of the distribution list is set to **Closed**, you can no longer add or remove contacts.

You can find more information in the following chapters:

"Adding contacts", page 45

"Removing contacts", page 46

## Functions in the read mode of Inxmail distribution lists

In the read mode of an Inxmail distribution list, you can view the **General**, **Address status**, and **Inxmail** tabs.

Tab	Description
<b>General</b>	The <b>General</b> tab includes the general distribution list information.
<b>Address status</b>	<p>The <b>Address status</b> tab includes a list of the contacts that have been added to the distribution list. The list includes, i. a. the <b>Locked</b>, <b>Undeliverable</b>, and <b>Status</b> columns.</p> <p>The list on the <b>Address status</b> tab is intended for information purposes only and cannot be edited or filtered. You can edit the contacts on the <b>General</b> tab if the distribution list has not been closed yet.</p>
<b>Inxmail</b>	<p>On the <b>Inxmail</b> tab, you can find different data related to the Inxmail list.</p> <p>In the <b>Properties</b> block, you can find the data that have been entered on the <b>Inxmail</b> tab when creating or editing the distribution list. Additionally, you can find the <b>Last synchronization</b> and <b>Last sent</b> fields here.</p> <p>In the <b>Inxmail mailings</b> block, you can find the different mailings that have already been sent to this distribution list.</p>

## Closing Inxmail distribution lists

In the action menu of an Inxmail distribution list, you can find the Close Inxmail distribution list function.

### Procedure

1. Open the Inxmail distribution list in read mode.
  2.  Open the **action menu**.
  3.  Click **Close Inxmail distribution list**.
- ✓ The distribution list status is set to **To delete** and is deleted in Inxmail with the next synchronization. After the distribution list has been deleted in Inxmail, the status is automatically set to **Terminated**.

### Adding contacts

You can add a new contact at any time to a distribution list. You will not be able to add or remove contacts if the distribution list **Status** has been set to **Closed**.

#### Tip

The distribution list status is displayed in the **Properties** block of the distribution list.

### Distribution lists app

In the **Distribution lists** app, you can add one or multiple contacts to an existing distribution list.

### Procedure

1. Open the desired distribution list.
  2.  Click this button in the **Contacts** block.
  3. Select one of the following options:
    - Add contacts via search:** Opens a window in which you can search for the desired contacts.
    - Add contacts via distribution list:** Opens a window in which you can search for the desired distribution lists. You can select one or multiple distribution lists. The contacts included in the distribution lists are added to the current distribution list.
  4. Search for and select all data records you want to add.
  5. Click **Apply**.
- ✓ The contacts are immediately added to the distribution list. Contacts which already exist in the distribution list are automatically ignored and not added twice.

## Contacts app

In the **Contacts** app, you can add the contacts of a view or list to an existing distribution list.

### Procedure

1. Open the **Contacts** app.
  2. Open a view or list.
  3. Select all the contacts which you wish to transfer to the distribution list.
  4.  Open the **action menu**.
  5.  Select **Distribution list** and then **Add to distribution list**.
  6. Select the distribution list of your choice
- ✓ The selected contacts are immediately added to the distribution list. The distribution list is not opened during this process. Contacts which already exist in the distribution list are automatically ignored and not added twice.

## Removing contacts

You can remove contacts from a distribution list.

You cannot add or remove contacts if the distribution list status has been set to **Closed**.

If a contact is removed from a distribution list in CAS genesisWorld, the corresponding recipient is also removed from the corresponding list in Inxmail Professional.

## Removing individual contacts

You can remove one or multiple contacts from an existing distribution list.

### Procedure

1. Open the selected distribution list in read mode.
  2. Click **Details** or **More elements** in the **Contacts** block of the data record to open the extended list.
  3. Select all the contacts you wish to remove.
  4.  Open the **action menu**.
  5.  Select **Remove contacts**.
- ✓ The selected contacts are immediately removed from the distribution list.

## Remove distribution list: automatically removing multiple contacts

With the **Remove distribution list** function, you can alternatively remove multiple contacts at once. For this function to work, the corresponding contacts you wish to remove must be included in a different distribution list.

### Procedure

1. Open the selected distribution list in read mode.
  2.  Open the **action menu**.
  3.  Select **Remove distribution list**.
  4. Select all distribution lists whose included contacts you wish to remove from the distribution list.
  5. Click **Apply**.
- ✓ The contacts from the selected distribution lists are immediately removed from the opened distribution list.

## 4.1.4 Inxmail New Experience: Mailing from template

If you use Inxmail New Experience, you can create a mailing from a template in CAS genesisWorld Web.

### Note

For this function to be available to you, the Inxmail New Experience access data must have been entered in the Management Console. Please contact your administrator for more information.

### Procedure

1. Open the Inxmail distribution list in read mode.
  2.  Open the **action menu**.
  3.  Select **Write to distribution list > Create e-mail campaign from template**.
  4. Choose which contacts you want to add to the mailing.
    - Add all contacts:** All contacts entered into the distribution list are adopted even those for which the **E-mail** contact method is not permitted.
    - Add contacts with permitted contact type:** Only the contacts for which the contact method **E-mail** has been permitted are included.
- ✓ The **Templates** window opens.

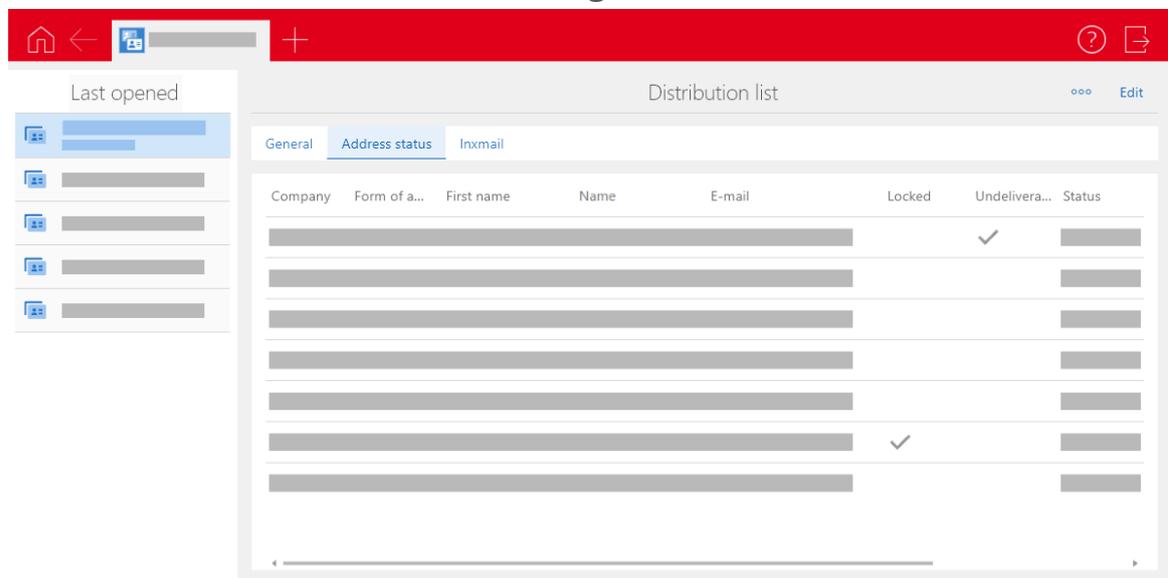
5. Select the desired template and click **Apply**.

You can choose from all templates in Inxmail New Experience. Moreover, you can select sent mailings as templates.

If you only want to display the templates from Inxmail New Experience, select the **Template** option.

- ✓ The Inxmail New Xperience website will open and you can subsequently edit and send the e-mail campaign based on the template you select.

#### 4.1.5 Address status tab in CAS genesisWorld Web



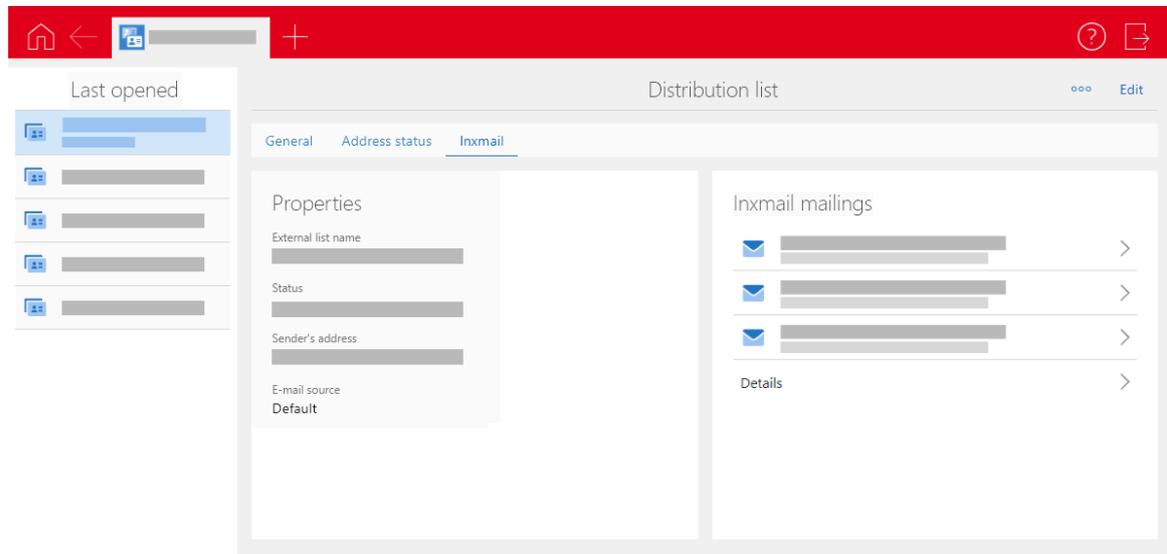
In CAS genesisWorld Web, a list of the contacts added to the distribution list is displayed on the **Address status** tab. The list includes the **Blocked** and **Undeliverable** marks as well as the respective **Status**.

The list cannot be filtered. You cannot open the displayed contacts via the list. Furthermore, you cannot add the unsubscribed contacts to the distribution list again.

To open the contacts added to the distribution list, switch to the **General** tab.

You can find more information on how to add and remove contact in the following chapters: "[Adding contacts](#)", page 45 and "[Removing contacts](#)", page 46.

## 4.1.6 Inxmail tab in CAS genesisWorld Web



On the **Inxmail** tab in distribution lists in CAS genesisWorld Web, you can find the information on the corresponding Inxmail Professional list, the used **E-mail source**, and the list of sent **Inxmail mailings**.

You can find more information in the following chapter: "**Inxmail tab**", page 25.

## 4.2 Locking e-mail addresses in CAS genesisWorld Web

You can manually lock the e-mail address of a contact data record in CAS genesisWorld. The respective e-mail address is then blocked and can no longer be contacted via mailings from any distribution lists in CAS genesisWorld.

In CAS genesisWorld Web, authorized users have the **Inxmail** block available for this purpose in contacts.

 Click the button, select the e-mail addresses you want to lock, and click **Apply**.

## 4.3 Inxmail mailings in CAS genesisWorld Web

In CAS genesisWorld Web, you can find the list of mailings sent to the distribution list on the **Inxmail** tab of the distribution list data record.

Additionally, you can find the individual archived email data records in the **E-mails** app and the contact dossiers of the mailing recipients.

## 5 Synchronization with Inxmail

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Distribution lists and addresses included in them are transferred to Inxmail as mailing lists.

The synchronization between CAS genesisWorld and Inxmail automatically runs every 3 minutes. In the process, all changes to the addresses included in the synchronization set are automatically identified and transferred.

Additionally, the system executes a synchronization run during the night so that Inxmail mailings that have not yet been successfully synchronized and recipients that have been removed from the synchronized address list in Inxmail are reentered.

You can review the time of the last synchronization of a distribution list in the distribution list data record in the **Last synchronization** field. You can find more information in the following chapter: "[General tab: special fields & functions](#)", page 23.

### Note

If you want to know which Inxmail list is the **Synchronized address list**, please contact your administrator.

Your administrator also defines which information and field values are transferred from Inxmail Professional to CAS genesisWorld.

## 6 Sending mailings

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### Note

The documentation of the integration of CAS genesisWorld and Inxmail only describes the respective functions in CAS genesisWorld and direct interfaces with Inxmail. The functions of Inxmail will not be described in detail in this documentation. For more information, contact the Inxmail GmbH or consult the respective Inxmail documentation.

Open Inxmail to send mailings. You can also start Inxmail using the **Inxmail** drop-down list in the distribution list data record. You can find more information in the following chapter: "[Inxmail drop-down list](#)".

### Inserting CAS genesisWorld variables in mailings

In Inxmail, you can insert personalized text from fields in CAS genesisWorld into your mailings.

### Note

You can only select columns that have been transferred to Inxmail from the distribution list in CAS genesisWorld. Please contact your administrator for more information.

#### Procedure

1. Click the position at which you want to insert the respective field value from CAS genesisWorld.
  2. Click the **Insert recipient data for personalization** button to insert recipient data for personalization.
  3. Select the column of the recipients table which contains the respective text from a CAS genesisWorld field.
  4. Set whether the text is to be adopted unchanged or needs to be adjusted.
  5. Determine what is supposed to happen if there is no text available for a recipient in the selected column of the recipients table.
- ✓ The CAS genesisWorld variable has been inserted.

## 7 After sending

The synchronization between CAS genesisWorld and Inxmail automatically runs every 3 minutes. In the process, information on subscriptions, unsubscriptions, sent e-mails, and bounces is transferred from Inxmail Professional to CAS genesisWorld.

### Tip

You can find more information on the synchronization interval in the following chapter: "[Synchronization with Inxmail](#)", page 50.

### Topics of this chapter

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### 7.1 Inxmail mailings in CAS genesisWorld

Inxmail mailings are archived in CAS genesisWorld as e-mails containing placeholders and automatically linked with the corresponding distribution list.

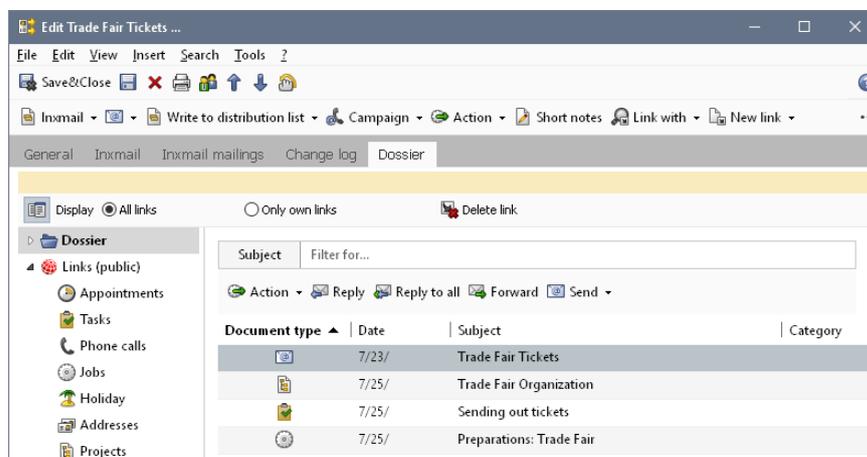
Additionally, the e-mail data record is linked with all addresses the mailing has been sent to.

You can find a preview of the sent mailing in the newly created data record.

The **Subject** of the newly created data record is automatically completed with the subject line of the mailing you have created and sent in Inxmail.

### Note

If the mailing could not be transferred from Inxmail to CAS genesisWorld and/or an error occurred, the e-mail data record is still created. However, instead of a preview of the sent mailing, the preview displays the error code received from Inxmail.

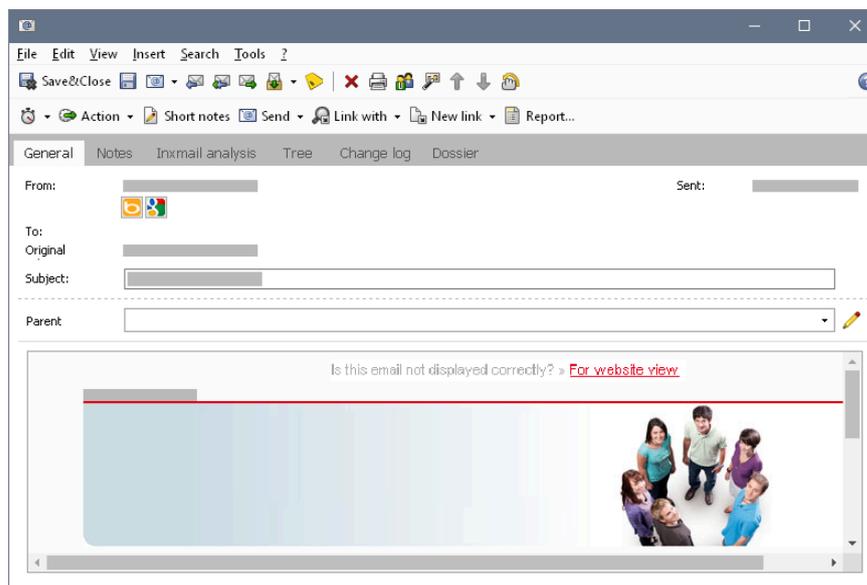


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### 7.1.1 Preview

On the **General** tab of the e-mail in the field on the lower window pane, you can find a preview of the sent mailing. You cannot edit this preview.



### 7.1.2 Inxmail analysis tab

With Inxmail, you can insert links into mailings, for example, **Request product information**. If recipients click one of these links, the action is automatically recorded.

On the **Inxmail analysis** tab, you can call up and review all click reactions and opening rates that were recorded for the mailing in Inxmail.

#### Note

Data on reactions and click-rates is not saved in CAS genesisWorld. To access data on reactions, you simply click the respective button. Conclusions about the clicking behavior of individual mailing recipients are only allowed if the respective recipients have actively agreed to the processing of personal data. Consent given for the processing of personal data is linked to the contact and can be viewed in Inxmail or CAS genesisWorld at any time.

You can find more information in the following chapter: "[Permission for tracking](#)", page 36.

## Retrieving click responses from Inxmail

As soon as you have selected the desired element in the list on the upper window pane, you can choose between different functions.

Function	Description
Load analysis	Click this button to display the addresses that have clicked the link on the lower window pane.
Refresh link	Click this button to refresh the analysis of the selected element.

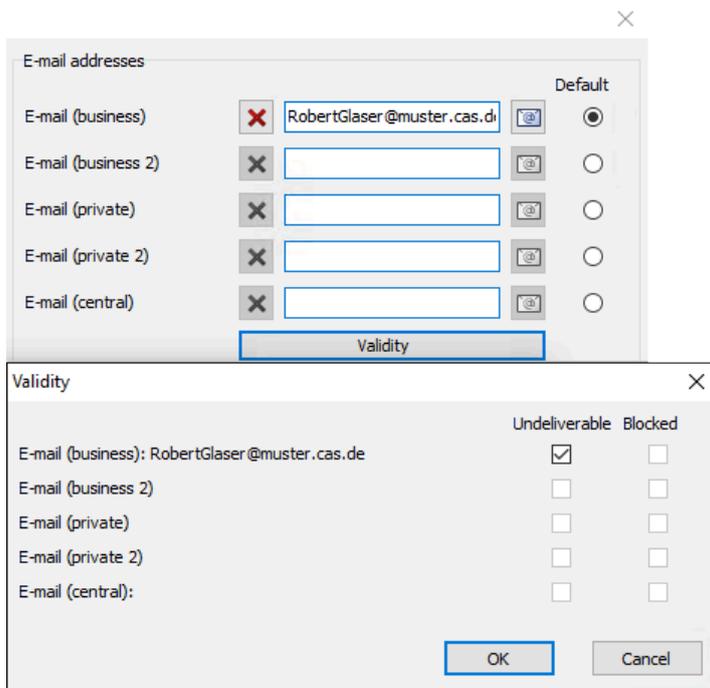
### Tip

Using the functions of the toolbar, you can continue working with the displayed addresses. For example, you can carry out actions or a campaign, change a specific address field, or link the addresses with additional data records.

## 7.2 Returns or bounces

Returns (bounces) are e-mails which have been returned to the sender because of incorrect e-mail addresses or other errors.

Information in bounces is transferred from Inxmail to CAS genesisWorld. The incorrect e-mail addresses are marked as **Undeliverable** in the address data record.



On the **Address status** tab of the distribution list, you can see which e-mail addresses are incorrect and need to be corrected.

Addresses in a distribution list in CAS genesisWorld which are marked as **Undeliverable** cannot be contacted via any distribution list. However, the respective addresses are still synchronized with Inxmail and are displayed in the corresponding Inxmail list.

Furthermore, the **Undeliverable** e-mail addresses are marked as bounces in all distribution lists that contain the respective e-mail address of the address data record. You can display all e-mail addresses contained in the distribution list that have been marked as **Undeliverable** on the **Address status** tab. You can find more information in the following chapter: "**Address status tab**", page 30.

You correct e-mail addresses in the corresponding address data record. After you have corrected the e-mail address, the **Undeliverable** option is automatically deactivated in the respective address.

### Note

You cannot deactivate the **Undeliverable** option manually.

Only hard bounces are marked as **Undeliverable**. Hard bounces occur if, for example, an e-mail address is incorrect or does not exist, the corresponding domain does not exist, or the e-mail server of the recipient blocks delivery of the mailing. So-called soft bounces are not marked as **Undeliverable**, for example, if a mailing cannot be delivered because the inbox is full.

The identification of hard-bounce profiles occurs in Inxmail. This process may take some time.

If a profile has been identified as a hard bounce on the Inxmail page and you would like to reverse this designation, please contact your Inxmail account manager.

Please note that e-mail addresses are marked as **Undeliverable** in the address data record. The mark does not relate and is not linked to the distribution list data record.

If multiple addresses contain the e-mail address that is marked as **Undeliverable**, the e-mail address is marked as **Undeliverable** in all of those addresses.

### Correcting e-mail addresses

1. Click **Contact data** in an opened address data record.
2. Click the **Validity** button in the **Edit contact data** window.
- ✓ A window opens in which you can see if the **Undeliverable** option is activated for one or more e-mail addresses.
3. Correct the e-mail address or addresses that have been marked as undeliverable in the **Edit contact data** window.
- ✓ The **Undeliverable** option is automatically deactivated and the corrected e-mail

address can be used for mailings again.

## 7.3 Subscriptions and unsubscriptions

E-mail recipients can subscribe to or unsubscribe from newsletters in Inxmail.

Subscriptions and unsubscriptions are transferred from Inxmail to CAS genesisWorld if the Inxmail mailing list is created using a CAS genesisWorld distribution list and the subscribing or unsubscribing recipients are included in the synchronized address list.

Subscriptions and unsubscriptions are saved in the respective distribution list and can be reviewed on the **General** and **Address status** tabs. You can find more information in the following chapters: "**General tab: special fields & functions**" and "**Address status tab**".

You can find more information on how new recipients from Inxmail are processed in the following chapter: "**New addresses from Inxmail Professional**", page 33.

### Note

If you want to know which Inxmail list is the **Synchronized address list**, please contact your administrator.

Your administrator also defines which information and field values are transferred from Inxmail Professional to CAS genesisWorld.

### Topics of this chapter

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### 7.3.1 Subscriptions

In Inxmail, you can allow recipients to subscribe to mailings. Thus, you can win new recipients for a mailing or distribution list.

For recipients to be added to the synchronization set and synchronized with CAS genesisWorld, the corresponding recipient must be added to the synchronized address list by an action in Inxmail.

For new subscriptions to distribution lists, the system checks whether the e-mail addresses of new recipients are known or unknown in CAS genesisWorld.

If an e-mail address can be uniquely assigned to one address in CAS genesisWorld, the address is added to the distribution list to which they have subscribed.

If an e-mail address cannot be uniquely assigned to one address in CAS genesisWorld but can be assigned using the first and last name of the recipient, the address is added to the distribution list to which they have subscribed.

If an e-mail address cannot be found in any address in CAS genesisWorld and can also not be assigned using the first and last name, the system automatically creates a new address data record and adds it to the corresponding distribution list. The field of the new data record are completed using values from Inxmail. The **First contact** field automatically contains the value **Inxmail**. Your administrator defines in which field of the e-mail address in the address data record the e-mail address of a new recipient is entered when creating a new address.

Subscriptions and unsubscriptions are saved in the respective distribution list and can be reviewed on the **General** and **Address status** tabs. You can find more information in the following chapters: "[General tab: special fields & functions](#)" and "[Address status tab](#)".

### Note

In compliance with the GDPR (General Data Protection Regulation), we recommend you use a double-opt-in process for the subscription to distribution lists in CAS genesisWorld. Recipients must explicitly confirm each subscription by clicking a confirmation link in a double-opt-in confirmation mailing.

Recipients that subscribe to a distribution list via Inxmail can already be available as an address in CAS genesisWorld. However, they may subscribe with a different e-mail address field than the one selected in the distribution list data record. The respective recipients are displayed in green and bold formatting in the distribution list. If the address is edited and the e-mail address used is entered in the selected field in the distribution list, the marking no longer valid is removed from the distribution list. You can find more information in the following chapter: "[Selecting the e-mail address field](#)", page 28.

You configure the synchronized address list and its actions which add recipients to the list in Inxmail. For more information, please contact your administrator or refer to the Inxmail documentation.

If you want to know which Inxmail list is the **Synchronized address list**, please contact your administrator.

Your administrator also defines which information and field values are transferred from Inxmail Professional to CAS genesisWorld.

To ensure that subscriptions and unsubscriptions work in Inxmail, you need to create the **Subscribe** and **Unsubscribe** actions in Inxmail. An instruction on how to proceed in Inxmail can be found in the Inxmail user documentation.

### Special case: Duplicate subscription of an address using different e-mail addresses

If an address data record in CAS genesisWorld has already been added to a distribution list but the recipient subscribes to the same distribution list via Inxmail using another e-mail address that is also available in CAS genesisWorld, special provisions apply.

The synchronization recognizes that the e-mail address of the new recipient belongs to an address that is already included in the distribution list. However, each CAS genesisWorld address can only be added once to a distribution list.

The respective subscription of the differing e-mail address is thus not taken into account in CAS genesisWorld and discrepancies between the Inxmail list and the CAS genesisWorld distribution list can occur.

## 7.3.2 Unsubscribing

Recipients can unsubscribe from both individual mailings and all mailings.

To unsubscribe via Inxmail Professional, the recipient sends an e-mail to the e-mail address of the respective Inxmail account with **Unsubscribe (list name)** entered in the subject field. These unsubscriptions always refer to a specific distribution list for Inxmail Professional.

To unsubscribe in general from all newsletters, the recipient sends an e-mail with **Unsubscribe All** in the subject field.

Unsubscriptions in Inxmail Professional are transmitted to CAS genesisWorld and the corresponding address is marked as **Unsubscribed** on the **Address status** tab of the distribution list. You can also display unsubscriptions on the **General** tab of the distribution list by using the **Unsubscriptions** filter. You can find more information in the following chapters: "**General tab: special fields & functions**", page 23 and "**Address status tab**", page 30.

If a recipient unsubscribes from a specific distribution list, the recipient is marked as **Unsubscribed** in the corresponding mailing list in Inxmail Professional. This mark is transferred to CAS genesisWorld with the next synchronization.

When unsubscribing from all lists, the respective recipient is unsubscribed from all lists in Inxmail Professional and marked as **Unsubscribed** in all CAS genesisWorld distribution lists. The recipient is also unsubscribed from the synchronized address list with a global unsubscription and is thus no longer included in the synchronization set. The used e-mail address is also automatically marked as **Blocked** in all address data records in which the e-mail address is included.

If you create a new address that contains a blocked e-mail address, the e-mail address is automatically marked as **Blocked** in this newly created data record. This also applies to new addresses that are automatically created by the synchronization.

You can find more information on automatically created address in the following chapter: "**New addresses from Inxmail Professional**", page 33.

## Note

Unsubscribing from a distribution list simply prevents you from writing to the e-mail address again. However, this unsubscription has no effect on all the other distribution lists. If, for example, an e-mail address was unsubscribed from a distribution list and a new distribution list is created containing this e-mail address, then the same address will be contacted again.

If someone requests that you no longer write to their e-mail address and they no longer wish to remain subscribed to any of the distribution lists, the respective e-mail address must be unsubscribed from all distribution lists via a global unsubscription. Only then will the e-mail address be marked as **Blocked**. However, other e-mail addresses within the same data record can still be contacted. Unsubscriptions or global unsubscriptions always refer to the specific e-mail address and not to the address data record.

If you want to know which Inxmail list is the **Synchronized address list**, please contact your administrator.

Your administrator also defines which information and field values are transferred from Inxmail Professional to CAS genesisWorld.

To ensure that subscriptions and unsubscriptions work in Inxmail, you need to create the **Subscribe** and **Unsubscribe** actions in Inxmail. An instruction on how to proceed in Inxmail can be found in the Inxmail user documentation.

## Special case: Unsubscribing by removing addresses

Prior to version x14.1.11, in CAS genesisWorld, you could unsubscribe addresses from distribution lists by removing the corresponding data records from the distribution list on the **General** tab. You can no longer do so. Removed addresses were not unsubscribed, but simply removed from the list on the Inxmail page, as well.

You can find more information in the following chapter: "[Removing addresses](#)", page 21.

### 7.3.3 Blocked addresses and unsubscriptions

If a blocked address is manually added or subscribed to a CAS genesisWorld distribution list, the address is displayed as **Unsubscribed** in the distribution list.

The synchronization still transfers the respective address to Inxmail Professional but marks it as **Unsubscribed**. This way the system prevents blocked addresses from being transferred and then contacted in Inxmail Professional.

## 8 Deleting distribution lists or addresses

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In CAS genesisWorld, you can delete the Inxmail distribution lists and the included addresses analogous to the usual distribution lists and addresses. In addition, you can retain the distribution list if you prefer and just delete the mailing list in Inxmail.

### Deleting addresses in CAS genesisWorld

The addresses that are included in an Inxmail distribution list can be deleted in CAS genesisWorld.

When you delete an address in CAS genesisWorld that contains a unique e-mail address, the corresponding recipient is deleted in Inxmail with the next synchronization.

When you delete an address in CAS genesisWorld but other synchronized addresses in CAS genesisWorld contain the same e-mail address, the corresponding recipient in Inxmail is not deleted.

If the respective address is restored from the recycle bin in CAS genesisWorld, the address is automatically available in the CAS genesisWorld distribution lists again and is retransferred to Inxmail with the next synchronization.

#### Note

If you want to know which Inxmail list is the **Synchronized address list**, please contact your administrator.

Your administrator also defines which information and field values are transferred from Inxmail Professional to CAS genesisWorld.

### Deleting addresses in Inxmail

When you delete addresses from one or all mailing lists in Inxmail, the addresses only remain deleted until the next synchronization with CAS genesisWorld. After the next synchronization to Inxmail, the corresponding recipients can be found in the mailing lists again.

### Closing distribution lists in CAS genesisWorld

When you set the **Distribution list status** to **Closed** on the distribution list **General** tab, the distribution list is no longer synchronized with Inxmail. Closed distribution lists can be reset to the **Active** status. However, you can no longer set the status to **In preparation**.

If the **Distribution list status** has been set to **Closed** in , the mailing list in Inxmail is not closed and can still be used in Inxmail.

If you reset the **Distribution list status** to **Active**, the addresses of the respective distribution list are again transferred to the still existing mailing list in Inxmail.

You can find more information in the following chapter: "[Distribution list status](#)", page 22.

**Note**

If you have deleted the corresponding mailing list in Inxmail in the meantime, the list is automatically recreated with the next synchronization.

## Deleting distribution lists in CAS genesisWorld

You can delete a distribution list in CAS genesisWorld using the default functions independent of whether you want to delete an Inxmail Professional distribution list or other types. Deleting a distribution list moves it into the recycling bin.

Distribution lists deleted in CAS genesisWorld are no longer included in the synchronization set. The corresponding mailing lists in Inxmail are retained and need to be manually deleted if necessary.

## Deleting Inxmail Professional mailing lists via CAS genesisWorld

You can delete Inxmail mailing lists from Inxmail via CAS genesisWorld.

### Procedure

1. Open the desired distribution list in CAS genesisWorld.
2. Select the **Terminate distribution list** option in the **Inxmail** drop-down list.
  - ✓ The status of the distribution list is set to **To delete**. Thus, the distribution list is marked as to be deleted and the corresponding mailing list is deleted in Inxmail with the next synchronization. The **Status** of the distribution list in CAS genesisWorld is set to **Terminated**. You can find more information in the following chapter: "[Status](#)", [page 26](#).
  - ✓ The **Inxmail** tab is removed from the distribution list.

**Note**

Distribution lists that have been deleted from Inxmail via CAS genesisWorld are still available in CAS genesisWorld. If you want to send data to Inxmail again, set the **Distribution list status** to **Active** again.

## Deleting mailing lists in Inxmail

When you delete a mailing list in Inxmail Professional, the **Distribution list status** of the distribution list is automatically set to **Closed in CAS genesisWorld**. "[Distribution list status](#)", [page 22](#).

## 9 Installation and setup

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To use the integration of CAS genesisWorld with Inxmail, you need to define the following settings as an administrator.

Before you define the Inxmail synchronization settings in the Management Console, you need to start the **OpenSync** service in the **Server Manager**.

After you have started the **OpenSync** service, you can define the settings in the **Management Console**.

For your employees to use the Inxmail functions in CAS genesisWorld, you need to grant specific rights to the corresponding users.

### Tip

You can find more information on required versions, licenses, and prerequisites in Inxmail in the following chapter: "[Versions and licenses](#)", page 16.

### Update information

If you update the module from an older version to a version as of CAS genesisWorld x14.1.0, you need to keep the following notes in mind.

### Note

As of CAS genesisWorld version x14.1.0, the synchronization with Inxmail is based on the **OpenSync** framework. Thus, you need to reenter the access data for the Inxmail Rest API and other data in the Management Console after the update to this version. You can find more information on what to enter in the Management Console in the following chapter: "[Logon parameter for the Inxmail server](#)", page 64.

In addition to reentering data in the Management Console, you also need to update the CAS genesisWorld database. You can find more information on the following page: [Online Help Database Wizard: Updating databases](#).

Moreover, you need to manually trigger the creation of the available columns of CAS genesisWorld addresses in Inxmail. You can find more information in the following chapter: "[Available columns of CAS genesisWorld addresses tab](#)", page 69.

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## 9.1 Starting the OpenSync service

Before you define the Inxmail synchronization settings in the Management Console, you need to start the **OpenSync** service in the **Server Manager**.

### Note

If you use more than one application server, the **OpenSync** service must only be started on one of the application servers.



### Procedure

1. Open the **Server Manager**.
2. Open the **Services** tab.
3.  Open the **OpenSync** settings.
4. Activate the **Start service upon server start** option.

### Note

We recommend activating the option to ensure a seamless integration and synchronization with Inxmail despite server pauses.

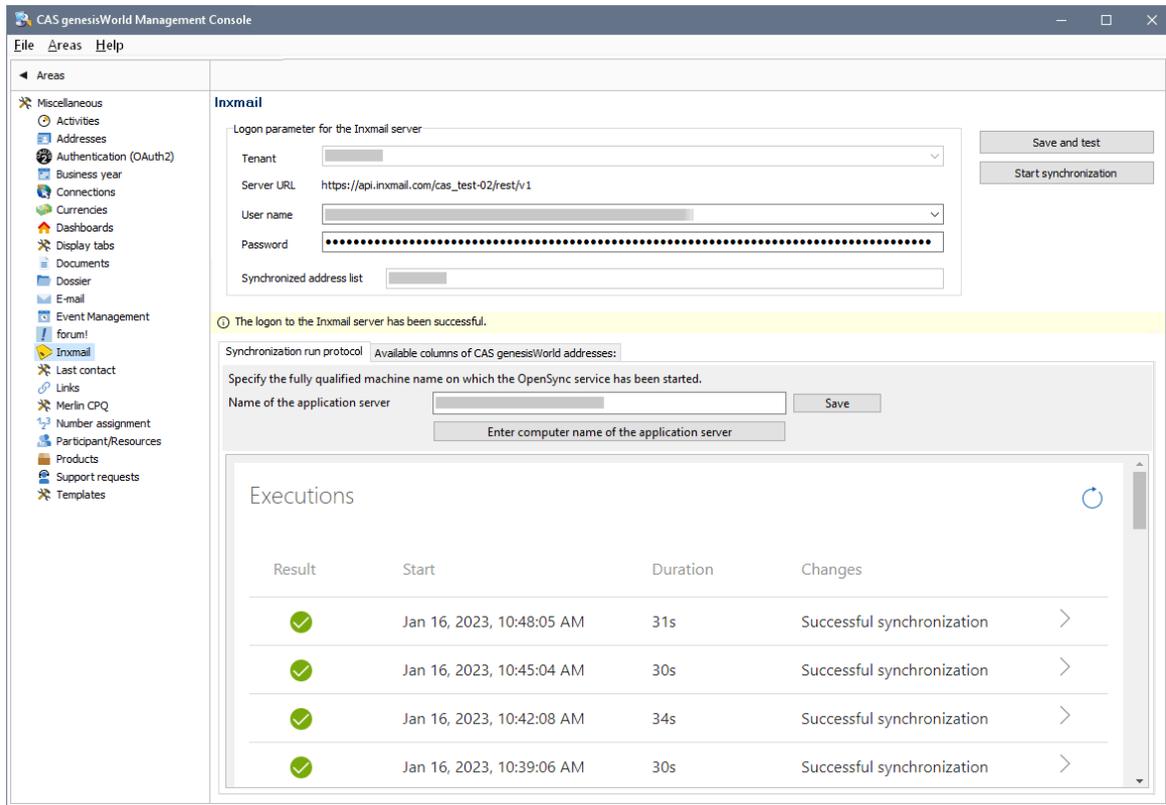
5. Start the service.

## 9.2 Management Console settings

After you have started the **OpenSync** service, you can define the settings in the **Management Console**.

### Opening the Inxmail area

1. Open the **Management Console**.
2.  Open the **Miscellaneous** area.
3. Select **Inxmail**.
4. Enter the respective settings in the corresponding areas below **Inxmail**.



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### 9.2.1 Logon parameter for the Inxmail server

Under **Inxmail** in the **Miscellaneous** area of the Management Console, you enter the logon parameter for the Inxmail server. For this, the **Inxmail Professional** and **Inxmail New Xperience** tabs are available for the respective data.

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## Inxmail Professional tab

In this area, you enter the tenant, as well as your **User name** and the **Password** of the **Inxmail Professional REST API**.

### Example

You must not use your regular Inxmail Professional access data.

If you use a proxy server, you define the corresponding settings on the **Connections** tab of the **Miscellaneous** area.

For a connection to the Inxmail server to be established, your firewall may need to allow the connection to specific destination IP addresses. If the connection cannot be established or is not allowed, add the following IP addresses:

- 93191162126
- 93191162124

### Procedure

1. Enter the name of your Inxmail tenant into the **Tenant** field.
  2. Enter the **User name** and **Password** that have been provided by Inxmail Professional.
  3. With **Save and test**, you check the logon data for the Inxmail server and create a synchronization job.
- ✓ If the logon has been successful, the remaining functions of the tab become active.

### Tip

You can change the name of the Inxmail tenant later without having to stop the synchronization. You can find more information here:

["Renaming the Inxmail tenant", page 65](#)

## Renaming the Inxmail tenant

You can change the name of the Inxmail tenant at any time, e.g. when the original name of the tenant was changed in Inxmail.

**Note**

The tenant must first be renamed in Inxmail and is then renamed in the next step in the Management Console.

The new name of the Inxmail tenant in the Management Console must match the name of the tenant previously used in Inxmail for the synchronization to continue to function. The tenant in Inxmail must technically remain the same. You cannot enter the name of another tenant.

## Renaming a tenant

1. In the Management Console, open the Miscellaneous area.
  2. Select Inxmail.
  3. Open a specific tab: **Inxmail Professional** or **Inxmail New Xperience**.
  4. If necessary, stop the running synchronization by clicking **Stop synchronization**.
  5. Click **Rename tenant**.
  6. Enter the new name.
  7. Click **OK**.
- ✓ The new tenant name is entered. If you have not already stopped the synchronization, it will be stopped and restarted using the logon credentials that have already been entered.

## 9.2.2 Synchronized address list

Using the **Synchronized address list**, you define which recipients from Inxmail Professional are included in the synchronization set and are thus synchronized with CAS genesisWorld.

As soon as a recipient is newly added to this dedicated mailing list in Inxmail Professional, the respective recipient is included in the synchronization set.

If no address is available in CAS genesisWorld for the recipient, an individual contact is created and filled with field values from Inxmail Professional.

If the e-mail address of a recipient can be found in exactly one address data record in CAS genesisWorld, the corresponding data record is enriched with information from Inxmail. This means that empty fields in the CAS genesisWorld data record are completed with values from Inxmail, but existing values are not overwritten. Thus, CAS genesisWorld remains the leading system for address management.

As an administrator, you define which information is transferred from Inxmail Professional to CAS genesisWorld via the **Available columns of CAS genesisWorld addresses** tab. You can find more information in the following chapter: "[Available columns of CAS genesisWorld addresses tab](#)", page 69.

With the first synchronization to Inxmail Professional, all addresses that are included in Inxmail distribution lists in CAS genesisWorld are transferred to Inxmail Professional and added or rather subscribed to the defined address list.

#### Note

If you were working with the **Inxmail** module before CAS genesisWorld version x14.1.0, we recommend creating and using a new mailing list as the synchronized address list. Do not use the **All** mailing list that is already available.

You can find more information in the following chapter: "[What's new?](#)", page 6.

### 9.2.3 Testing an e-mail address for new addresses

Through the synchronization with Inxmail Professional, new addresses can be created in CAS genesisWorld.

You can find more information in the following chapters:

["New addresses from Inxmail Professional"](#), page 33

["Subscriptions"](#), page 56

As an administrator, you can define in which field in the address data record the e-mail address of new recipients is to be entered. **E-mail (business)** is selected by default.

#### Note

To change the selected field, you need to stop the synchronization.

Recipients that subscribe to a distribution list via Inxmail can already be available as an address in CAS genesisWorld. However, they may subscribe with a different e-mail address field than the one selected in the distribution list data record. The respective recipients are displayed in green and bold formatting in the distribution list. If the address is edited and the e-mail address used is entered in the selected field in the distribution list, the marking no longer valid is removed from the distribution list. You can find more information in the following chapter: "[Selecting the e-mail address field](#)", page 28.

#### Selecting the field of the e-mail address

1. In the Management Console, open the **Miscellaneous** area.
2. Select **Inxmail**.
3. Select the desired field from the **E-mail address for new addresses** dropdown list.

### 9.2.4 Synchronization run protocol tab

On the **Synchronization run protocol** tab, you can find the individual protocols of each synchronization run. The list is updated automatically, but can be updated manually as well.

Furthermore, you enter the computer name of the application server used for the synchronization here.

## Protocol list

In the list, you can find:

- The result of the last execution
- The starting time of the next synchronization
- The history of all completed synchronizations
- The status of the running synchronization

## Opening or updating executions

- Click an execution to open the corresponding protocol containing detailed information on the execution.
-  Click the button to update the list of executions.

## Synchronization task icons

Icon	Description
	This icon marks synchronisation tasks which have never been executed in the overview.
	Executions are marked with <b>Synchronization running</b> if the synchronization is currently running.
	Executions with a <b>Successful synchronization</b> are marked with this icon.
	Executions are marked with this icon in case of a <b>Failed synchronization</b> .

## Name of application server

In the **Name of application server** field, you enter the fully qualified computer name of the application server on which you have started the **OpenSync** service.

Button	Description
<a href="#">Entering the name of the used application server</a>	Click the button to automatically enter the computer name of the application server currently in use.

Button	Description
<a href="#">Save</a>	Click this button to save.

### 9.2.5 Available columns of CAS genesisWorld addresses tab

As soon as the logon at the Inxmail server has been successful, you can find all fields or columns from CAS genesisWorld addresses on this tab.

The fields are created in Inxmail when you make a change and subsequently click [Synchronize column information](#).

Existing fields which were not included in the transfer are not deleted in Inxmail.

All transferred columns can be used for a mailing.

#### Selecting and transferring columns

1. In the [Selection](#) column, activate the address columns which are supposed to be transferred to Inxmail when synchronizing the recipients of a distribution list of the [Inxmail](#) type.
  - ✓ With the next synchronization, all selected columns are transferred to Inxmail for each address in an Inxmail distribution list.
2. Click [Synchronize column information](#) to manually synchronize data with Inxmail.
  - ✓ The selected columns are created.

### 9.2.6 Starting the synchronization

As soon as you have started the [OpenSync](#) service and defined all necessary settings in the [Management Console](#), you can start the synchronization.

#### Procedure

1. Open the [Management Console](#).
2.  Open the [Miscellaneous](#) area.
3. Select [Inxmail](#).
4. Click [Start synchronization](#).

#### Note

The first synchronization run may take some time.

### Tip

Each synchronization checks whether the synchronized distribution lists or lists have been changed. This check for changes takes longer if you have created many or very large distribution lists. We recommend closing distribution lists that are no longer in use to remove them from the synchronization set. You can reactivate closed distribution lists at any time.

You can find more information in the following chapter: "[Distribution list status](#)", page 22.

## 9.2.7 Inxmail New Xperience tab

In this area, you enter the tenant, as well as your **User name** and the **Password** of Inxmail New Xperience.

### Note

The user name and password must correspond with a user in Inxmail New Xperience. The respective user must have the necessary rights to create mailings in Inxmail New Xperience.

#### Procedure

1. Enter the name of your Inxmail tenant into the **Tenant** field.

Please note that you are using a tenant name from Inxmail New Xperience. You enter the tenant name for Inxmail Professional on the tab of the same name. You can find more information in the following chapter: "[Inxmail Professional tab](#)", page 65.

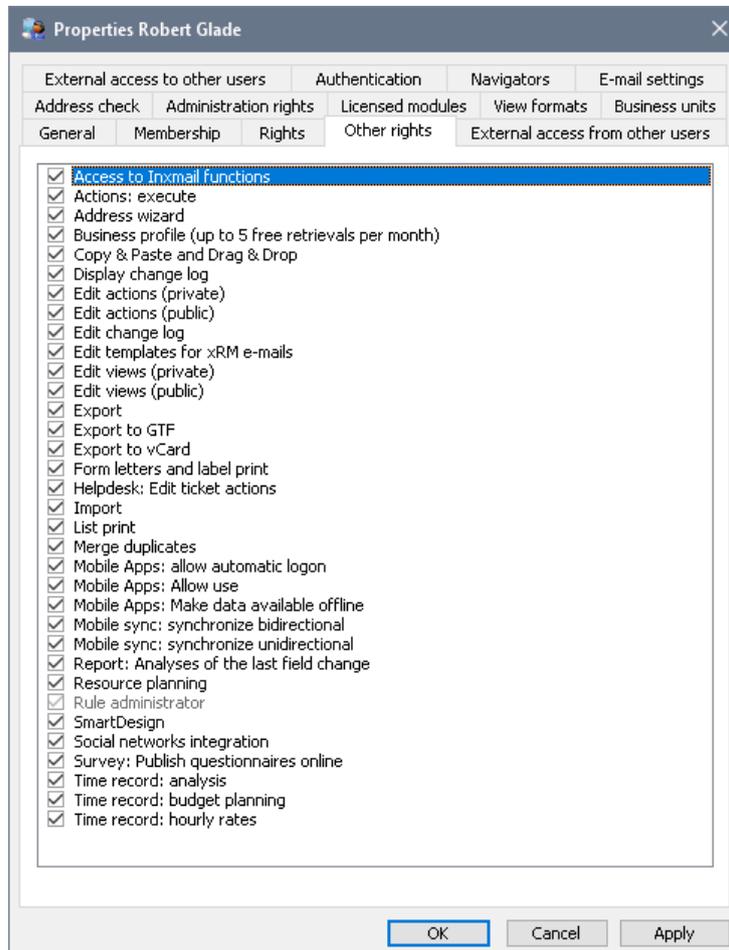
2. Enter the **User name** and **Password** that have been provided by Inxmail Professional.
3. With **Check authentication data**, you check the logon credentials for the Inxmail server.
4. Click **Save logon data** to save the logon data for the Inxmail server.

## 9.3 Granting rights: Access to Inxmail functions

The administrator needs to grant the users who are supposed to use Inxmail a specific right in the Management Console.

Users without the required rights can only see that the distribution list type is set to **Inxmail**. The **Inxmail** and **Inxmail mailings** tabs in distribution lists or the **Distribution list** tab in archived Inxmail mailings are hidden from those users.

The **Undeliverable** and **Blocked** marks in address data records are also hidden without the necessary rights. You can find more information in the following chapter: "[Returns or bounces](#)", page 54.



### Granting the Inxmail right

1. Open the **Management Console**.
  2.  Open the **User Management** area.
  3. Open the **Properties** window of the respective user or users.
  4. Activate the **Access to Inxmail functions** option in the **Other rights** tab.
- ✓ The selected user or users have the necessary rights to use all functions of the **Inxmail** module.

## 9.4 Setting up the notification and action service

Using the notification and action service, administrators can define rules that automate specific processes in your company. A rule determines which events automatically trigger which actions.

Using those rules, you can, for example, define that a new follow-up task is created as soon as an address contains a specific value in the **Profile score** field filled in by the resynchronization from Evalanche.

### Exemplary procedure

1. Open the **Management Console**.
2. Open the **Rules** area.
3. Select the **Rules for notifications and actions** folder.
4.  Click **New**.
5. Enter a **Name** and a **Description** of the rule.
6. Select the **Data record type** you want to monitor.
7. Activate the **All** option.
8. Select **Data record change** as the **Event type**.
9. Activate the **Changing data record** option and then the **Specific change of a field value** option.
10.  Click the **Settings** button next to the **Specific change of field value** option.
11. Select the **Profile score** field from the **Field name** drop-down list.
12. Select **greater or equal** as the condition.
13. Enter the desired scoring value and click **OK**.
14. Select the desired **Monitoring interval**.
15. Click the **Enter computer name of the application server** button.
16. Open the **Action** tab.
17. Select **New data record** from the **Action** drop-down list.
18. Select **Task** from the **Data record type** drop-down list.
19. Select the desired **Participants** for the task that is to be newly created, for example, your sales team.
20. If required, predefine **Field values**, for example, **Follow-up** as **Subject** value.
21. Activate the **Link new data record with activating data record** option and select **General link** as the **Link type**.

22. Click **OK**.

- ✓ The rule is created. As soon as an address in CAS genesisWorld contains at least the defined value in the **Profile score** field, a new task is created and linked with the respective address. The task contains the participants and field values defined by the rule.