Administering ToutApp Exchange Reply Tracking

This document will walk you through everything you need to know about ToutApp's support for tracking replies to your Touted emails when using Microsoft's Exchange email server.

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1. WHAT IS EXCHANGE REPLY TRACKING?

Exchange Reply Tracking allows sales teams to track replies to their outbound emails. The ability to track replies to outbound emails allows sales teams to:

- Monitor their potential buyers' engagement real time with live alerts
- Measure the overall effectiveness of their email templates with aggregate reply rate data
- Auto-log their email activity and success in their CRM of record, eliminating the need for manual CRM updates
- Auto-stop Sales Campaigns when a reply is detected so that subsequent scheduled emails are cancelled
- Measure the effectiveness of their Sales Campaigns with reply rates to their outbound emails
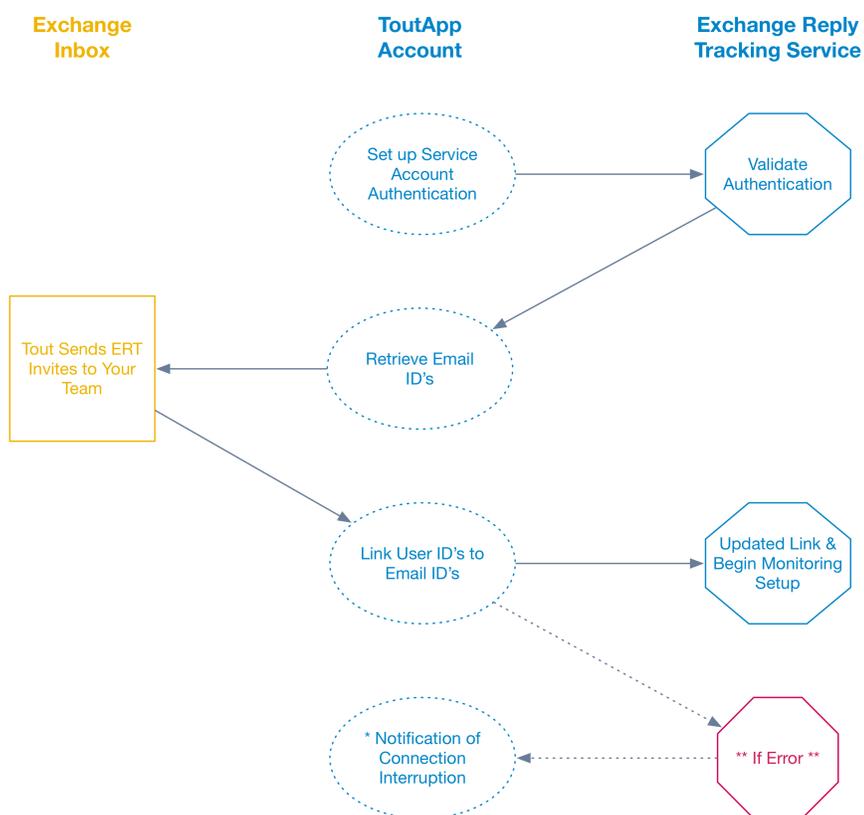
2. HOW DOES EXCHANGE REPLY TRACKING WORK?

ToutApp provides Exchange Reply Tracking by connecting a ToutApp user's ToutApp account to their Exchange account.

Why does ToutApp need to connect to Exchange Servers to implement Exchange Reply Tracking?

In order for reply tracking to work properly, it must do two things: (1) It must work regardless of what email client is being used, and (2) it can't depend on whether or not the email client is active/open. In order for this to happen, ToutApp needs to connect to the Exchange server. Some solutions avoid accessing the Exchange server when trying to provide reply tracking functionality, but these solutions require that the email client is open, which is a considerable limitation, given that an email client can be off at the end of the day, during vacations etc.

Note that using a Service Account, rather than individual accounts, is a cleaner way to provide and manage access to your Exchange server. This is explained in more detail in Section 5.

How does data flow through ToutApp's Exchange Reply Tracking architecture?

**Exchange
Inbox**

**ToutApp
Account**

**Exchange Reply
Tracking Service**

Set up Service
Account
Authentication

Validate
Authentication

Tout Sends ERT
Invites to Your
Team

Retrieve Email
ID's

Link User ID's to
Email ID's

Updated Link &
Begin Monitoring
Setup

* Notification of
Connection
Interruption

** If Error **

3. EXCHANGE SYSTEM REQUIREMENTS

Exchange Reply Tracking for ToutApp is currently supported in the following Exchange Environments:

- Exchange Server 2010 - Service Pack 3
- Exchange Server 2013 - Service Pack 1
- Exchange Server 2016
- Exchange Online

The following settings need to be enabled on the Exchange Server:

- Exchange Web Services (EWS) on an SSL Connection
- Basic authentication
- Recommended: Auto-Discovery 'on'

4. SETTING UP AN INDIVIDUAL TOUT USER WITH EXCHANGE REPLY TRACKING

Individual ToutApp users can set up Exchange Reply Tracking from the Settings area of the ToutApp service:

1. Go to www.toutapp.com/next#settings/exchange_settings
2. Enter your Outlook/Exchange email address (See note on User Principal Name below)
3. Enter your Exchange password

Exchange Reply Tracking

ToutApp's Exchange Reply Tracking lets you know when someone has replied to your email (Learn more here).

To enable Exchange Reply Tracking, please enter your Outlook credentials.

| Standard Account | Service Account |

Outlook Email:

Password:

[Connect]

Note: If your email address and Outlook 'User Principal Name' are not the same, you'll have to use your User Principal Name. Don't know what that means? Find out more here.

NOTE: If you have a larger number of ToutApp users, for example more than 10, you should consider using a Service Account rather than having each ToutApp user enter their Outlook credentials individually. See the next section for how to set up a Service Account.

User Principal Name vs Outlook Email Address

Microsoft's Active Directory has the concept of a 'User Principal Name (UPN)' which allows users to login to Microsoft services. The UPN can be different than the regular email address a user is used to

using. Unfortunately, this may lead to complications when trying to enable ToutApp's Exchange Reply Tracking:

- If the UPN and email address a user uses are the same, then entering regular email credentials in ToutApp settings will work
- If the UPN and email address a user uses are NOT the same, then entering the regular emails credentials will NOT work. The user has to enter their UPN.

A user's UPN can be found in one of the following ways:

1) An Exchange Admin can look it up in the directory list
2) A user can look up their own UPN by doing the following:
   - Click on the 'Start Menu'
   - Type 'cmd' into the search field
   - Type 'whoami/upn' and hit enter.

Changing Passwords

If an individual's Outlook password is changed for any reason (password policy etc), then that user will receive an email from ToutApp informing them that their connection between ToutApp and Exchange has been lost. The email will contain a link that allows them to re-establish the connection by providing their Exchange login credentials again.

5. USING A 'SERVICE ACCOUNT' TO SET UP EXCHANGE REPLY TRACKING FOR YOUR WHOLE TEAM

What is a Service Account and why would I use one?

A Service Account is an Exchange account that can perform actions by using the permissions that are associated with another account. Through the connection to Exchange, the service account will track replies on all of the users' mailboxes that it is set up to monitor.

We recommend that Toutapp subscriptions with over 10 users, or anyone who wants to centrally manage access to the Exchange server due to password expiration policy, security, etc., use the Service Account approach for Exchange Reply Tracking.

While the initial setup using a service account will require additional steps to set up, and likely involve your Exchange Administrator, ongoing maintenance as users are added or password credentials changed will be minimal.

The Exchange Service Account will likely be managed by your Exchange Administrator in your IT department. The Toutapp Master Admin can ask the Exchange Administrator to enter the Service Account credentials during initial setup. The Exchange Admin may not need a Toutapp account, and will likely not want to share the Service Account credentials.

Note: The Service Account doesn't send or forward any emails – the Service Account is the mailbox that the ToutApp mailbox monitoring service uses to monitor the mailboxes of each of the users it is setup for.

Setting Up a Service Account:

Here is how you can set up and use a Service Account to provide Exchange Reply Tracking to your whole team:

1. **Prepare your Exchange Server for ToutApp Reply Tracking**
    i. Enable Exchange Web Services (EWS) on an SSL connection.
        a. Ensure your Exchange server has a signed certificate from an industry-standard certificate authority
        b. If you have a firewall, enable an inbound connection to your Exchange client access server on ports 80 and 443.

2. **Set up an Exchange Service Account so the ToutApp Reply Tracking Service can communicate with your Exchange server**
    i. Create an Exchange user with a mailbox that will act as the service account. You'll use this email address for this mailbox to configure Exchange impersonation for the service account.
    ii. Using Exchange Management Shell, enter the commands that enable service account impersonation for your version of Exchange.

    IF you are using Exchange 2010, 2013, 2016:

Enable the Active Directory extended permission for ms-Exch-EPI-Impersonation on all Client Access servers:

Get-ExchangeServer | where {$_IsClientAccessServer -eq $TRUE} | ForEach-Object {Add-ADPermission -Identity $_.distinguishedname -User (Get-User -Identity <ServiceAccountEMailAddress> | select-object).identity -extendedRight ms-Exch-EPI-Impersonation}

Enable the Active Directory extended rights for ms-Exch-EPI-May-Impersonate to let your service account impersonate all accounts on your Exchange server. You'll set a filter later that lets you limit the users the service account to the users of ToutApp.

Get-MailboxDatabase | ForEach-Object {Add-ADPermission -Identity $_.distinguishedname -User <ServiceAccountEMailAddress> -ExtendedRights ms-Exch-EPI-May-Impersonate}

IF you are using Exchange Online offered by Microsoft Office 365:
Enable customization on your Exchange server. Enable-OrganizationCustomization

iii. Using Exchange Management Shell, enter the commands to configure your service account to impersonate the group of ToutApp users.
   a. Create a management scope to define a filter that groups together the Exchange users who will use ToutApp. For example, if you want only your sales team to access ToutApp, and their Exchange mailboxes all have the same value Sales for the filterable property Department, you'd enter Department -eq 'Sales' in place of <ChooseRecipientFilter>.

   New-ManagementScope -Name: <ChooseManagementScopeName> -RecipientRestrictionFilter:<ChooseRecipientFilter>

   b. Create a management role assignment that restricts the service account to impersonate only the users defined in the management scope.

   New-ManagementRoleAssignment -Name: <ChooseRoleAssignmentName> -Role:ApplicationImpersonation -User:<ServiceAccountEmailAddress> -CustomRecipientWriteScope: <EnterToutappManagementScopeName>

iv. Run the Microsoft Remote Connectivity Analyzer using ToutApp Reply Tracking parameters to validate your Exchange Setup

3. **Create a distribution list in Exchange or Outlook and add all of your ToutApp users to that group**

   i. You can use existing distribution lists such as "Sales Team." New users need to be added to this distribution list as part of onboarding for ToutApp Reply Tracking to be enabled.

4. **Enable Exchange Reply Tracking in ToutApp Settings**

   Set ToutApp to communicate with Exchange by enabling Exchange Reply Tracking. This can be done in ToutApp Settings (see image below) by providing your Service Account credentials along with the Distribution List name defined in the previous step. Each user in the distribution list will receive an email invitation to enable ToutApp Reply Tracking for their individual accounts.
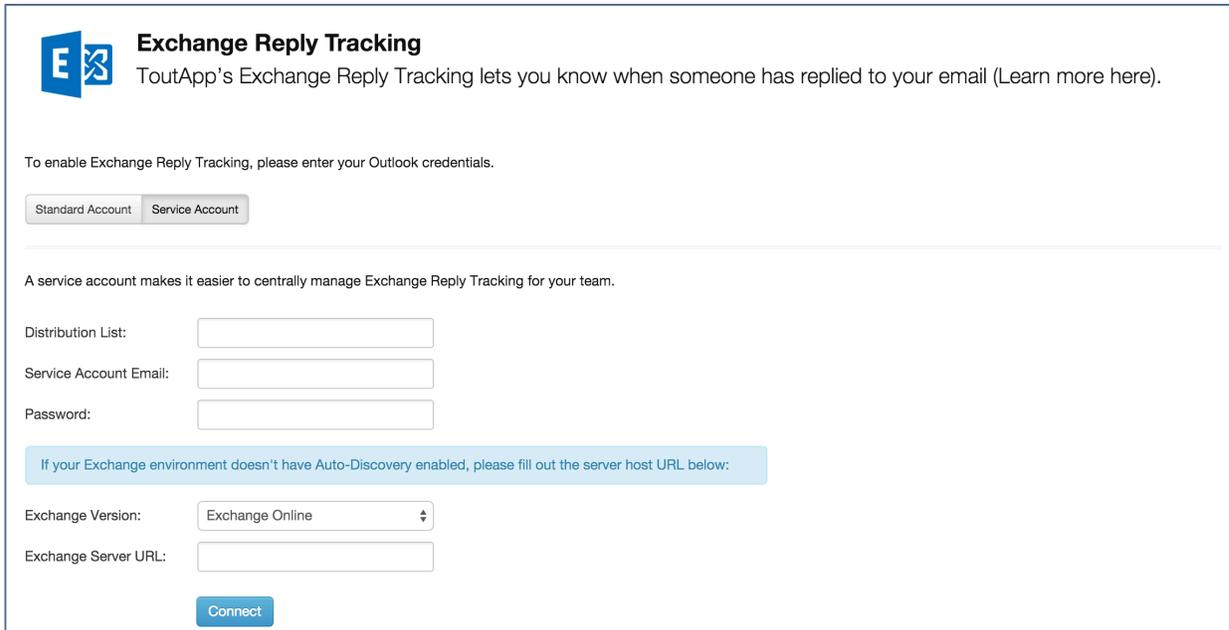
   Exchange Reply Tracking
   ToutApp's Exchange Reply Tracking lets you know when someone has replied to your email (Learn more here).

   To enable Exchange Reply Tracking, please enter your Outlook credentials.

   Standard Account | Service Account

   A service account makes it easier to centrally manage Exchange Reply Tracking for your team.

   Distribution List:
   Service Account Email:
   Password:

   If your Exchange environment doesn't have Auto-Discovery enabled, please fill out the server host URL below:

   Exchange Version: Exchange Online
   Exchange Server URL:

   Connect

5. **Monitor users' acceptance of the ToutApp Reply Tracking invitation**

   This can be done from the Settings page in Toutapp.com under Email Reply Tracking, once the Service Account has successfully connected to ToutApp.

   Changing Service Account Passwords

   It is a good idea to set the password requirements for the Service Account to either never expire, or to expire rarely. If the Service Account password expires, then the connection between ToutApp and the

Exchange Service Account will break, and no user will have Reply Tracking enabled until the new credentials are entered in ToutApp Settings.

The Exchange and/or Active Directory Administrator can configure the password policy for the service account.

6. HOW TO ENABLE ADDITIONAL TOUTAPP USERS WITH EXCHANGE REPLY TRACKING

Individual Accounts

If you are not using a Service Account, and you add a ToutApp user who would like to also have Exchange Reply Tracking, simply have the new user go to their Settings area in ToutApp and follow the instructions in section 3 of this document

Service Accounts

If you are using a Service Account, then add a new user to the distribution list first and then add them as a Tout user. NOTE: In order to ensure that new ToutApp users will be set up properly for Exchange Reply Tracking, THEY MUST BE ADDED TO THE DISTRIBUTION LIST FIRST. Before adding the user to ToutApp, ensure that the following are set up.

- The user is a member of the Distribution List created in Step 3
- The user is part of the filter specified in Management Scope defined in Step 2

Once the user is added in Tout, we will check with the ERT system to confirm the new user is on the distribution list – if the user is on the distribution list they will receive an email inviting them to connect their ToutApp account to their Exchange account.

7. SECURITY INFORMATION

ToutApp takes security very seriously – below you will find some key information regarding how we approach Exchange Reply Tracking:

- *What impact does this have on my Exchange environment?*
  - o The performance impact to the exchange environment should be minimal.

- *What are the protocols and encryption used for data at rest and in motion?*
  - o Credentials along with all sensitive data are encrypted at rest using AES128 encryption with a salted hash. All data in transit is sent over SSL connection.

- *What data exactly, in terms of the emails (subject, headers, recipients, message body), do we have access to?*
  - o We track the subject, header, and sender. The reply tracking service doesn't look at the message body or any other data.

- *How LONG do we hold on to any of the email data?*
  - o We hold on to **tracking** data provided by the Exchange Reply Tracking service indefinitely. This info can be purged upon request

- *Will this slow down the delivery of emails at all?*
  - o No

- *What security certifications do you have more generally? Is there a document?*
  - o Our Toutapp Security Overview contains all security related info about the Toutapp platform. That document can be provided to customers with an NDA. At a high level, we perform quarterly penetration tests with NCC Group, have a web security training program required for our engineering team, and have a comprehensive security awareness training program rolled out across our entire employee base, which includes assessments twice a year, monthly simulated phishing attacks, and training modules spread across various security topics.

- *How do you protect the credentials that users are entering into Toutapp?*
  - o Credentials, along with all sensitive data, are encrypted at rest using AES128 encryption with a salted hash.

8. FAQS

The following are some frequently asked questions:

1. Does it matter what version of Outlook I am using?
    a. No – The only thing that matters is meeting certain Exchange Server requirements, which are listed in this document.
2. How much information does Tout see about emails – headers, subjects, email body etc?
    a. Please see the Security section of this document
3. What are the common things that go wrong?
    a. UPN not equal to Outlook email – If a user's UPN and email address are not the same, this can lead to complications. Please see Section 4 of this document
    b. Customer has two domains - If you have two different domains (due to acquisition or previous name), then focus on using the User Principal Name