

Login and Configuration

- [CRM URL and Credentials Entry](#)
- [Logout and Session Management](#)

CRM URL and Credentials Entry

After installing the Outlook plugin and activating the license on the CRM side, users can log in directly from Microsoft Outlook.

To authenticate:

1. Open an email in Outlook.
2. Access the **Apps / Add-ins** menu.
3. Select **vtenext Mail Connector**.
4. Enter the **vtenext CRM URL**.
5. Enter your **CRM username**.

The plugin uses the same authentication methods configured in the CRM. Depending on the CRM setup, authentication may require:

- Standard password authentication;
- Multi-factor authentication (MFA) via the **Wilson** CRM application;
- Single Sign-On (SSO) through an external identity provider.

The credentials used are the same as those used to access the vtenext CRM.

Once authentication is successfully completed, the plugin is ready to link emails to CRM records.

Logout and Session Management

Outlook Mail Connector maintains an authenticated session with the vtenext CRM once login has been completed.

Logout

Users can log out of the plugin at any time.

Logging out:

- simply disconnects the plugin session from the CRM;
- does not modify any data stored in the CRM;
- does not remove previously linked emails.

To use the plugin again after logout, a new authentication will be required.

Session Management

The plugin session follows the authentication policies defined in the CRM.

If the session expires or credentials become invalid, the plugin will prompt the user to log in again before continuing to link emails.