

# Operational Usage

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# Accessing the Plugin from an Email

Outlook Mail Connector is accessed directly from within an opened email in Microsoft Outlook via the Apps (Add-ins) menu.

To open the plugin:

1. Open an email in Outlook.
2. Access the **Apps / Add-ins** menu associated with the message.
3. Select the **vtenext Mail Connector** icon.

Once opened, the plugin interface allows the user to link the current email to an existing record in the vtenext CRM.

The plugin can be used on both received and sent emails.

# Module Selection and Record Search

Once the Outlook Mail Connector plugin is open, users can select the CRM module to which the email should be linked and identify the appropriate record.

## Module Selection

Users can freely select the destination CRM module from those available according to their permissions, for example:

- Companies
- Contacts
- Leads
- Opportunities
- Tickets
- etc...
- Custom modules configured in the CRM

Module visibility fully reflects the user's CRM permissions.

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## Automatic Record Suggestions

The plugin automatically analyzes the email sender and suggests the most relevant CRM records first.

This intelligent matching helps speed up the email linking process by reducing the need for manual searches.

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# Manual Record Search

Users can always:

- manually search for a record;
- choose any accessible CRM module;
- select a different record even if automatic suggestions are provided.

# Linking Emails to the CRM

After selecting the appropriate CRM module and identifying the correct record, the email can be linked to the CRM.

Email linking is always performed manually, one email at a time.

To link an email:

1. Select the destination CRM module.
2. Select the appropriate record.
3. Confirm the action using the link/save option within the plugin.

Once completed:

- the email is fully copied into the vtenext CRM;
- it is associated with the selected record;
- it is registered in the **Messages** relationship of the chosen module.

Email linking can be performed for both incoming and outgoing messages.

# Attachment Management

When an email is linked to the CRM using Outlook Mail Connector, any attachments included in the message are handled automatically by the system.

No additional action is required from the user.

## Attachment Behavior

Attachments associated with the email:

- are saved together with the linked email;
- remain attached to the communication in the **Messages** relationship;
- are also archived in the CRM **Documents** module;
- are accessible from the related CRM record.

This ensures that all documents exchanged via email are centrally stored within the CRM, maintaining consistency and traceability of communications.

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## Operational Note

Attachment saving occurs automatically when the email is linked to the CRM.

It is not possible to selectively choose which attachments to store: all attachments included in the email are archived by the system.

# Email Positioning in the CRM and Messages Relationship

Emails linked through Outlook Mail Connector are stored directly within the selected record in the vtenext CRM.

Specifically:

- the email is associated with the selected module (Companies, Contacts, Leads, Opportunities, Tickets, etc.);
- it is registered within the **Messages** relationship of that record;
- the full email content is copied into the CRM.

This allows a complete communication history to be maintained directly within CRM records, improving traceability, collaboration, and access to relevant information across teams.

Any attachments included in the email remain associated with the communication and are accessible both from the Messages relationship and from the related Documents module.