Permissions and Security

CRM Permission Replication in the Plugin

Outlook Mail Connector fully replicates the permission structure configured within the vtenext CRM.

This means that users can only access within the plugin:

- the CRM modules they are authorized to view;
- the records they have permission to access;
- the data allowed by their CRM profile and role configuration.

The plugin does not grant any additional permissions beyond those already defined in the CRM.

This ensures:

- consistent access control between Outlook and the CRM;
- compliance with internal security policies;
- protection of sensitive business information.

Email Data Handling and Privacy Considerations

When an email is linked to the CRM using Outlook Mail Connector, the message is fully copied into the vtenext CRM.

Specifically, the system stores:

- the complete email body;
- key message information (sender, recipients, subject, date);
- all included attachments.

The plugin does not create a simple reference to the Outlook mailbox. Instead, it stores a full copy of the communication within the CRM, making it part of the selected record’s communication history.

Awareness in Communication Management

Once an email is linked to the CRM, it becomes part of the organization’s managed CRM data.

This applies to any linked email, regardless of whether it originates from a corporate or non-corporate account configured in Outlook.

As a result:

- the email may be accessible to other authorized CRM users;
- access remains governed by CRM roles, profiles, and security settings;
- only communications that are organizationally authorized and compliant with internal policies and agreed operational procedures should be linked.

Operational Considerations

Since emails are archived within the CRM:

- internal communication management policies must be respected;
- users should carefully evaluate which emails are appropriate to link;
- GDPR and data protection regulations must be observed in accordance with the organization’s internal procedures.