

Outlook Mail Connector

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Introduction

What is Outlook Mail Connector

Outlook Mail Connector is a Microsoft Outlook plugin (available in the Microsoft Store under the name vtenext Mail Connector) designed to manually link emails and their attachments to the vtenext CRM.

The plugin allows users to associate individual emails — both received and sent — with existing CRM records such as Companies, Contacts, Leads, Opportunities, Tickets, etc., including custom modules visible according to user permissions.

Emails are fully copied into the CRM, including content and attachments, enabling centralized communication tracking directly within CRM records.

Email linking is always performed manually, one email at a time, ensuring users maintain full control over which communications are archived in the system.

Supported Email Accounts

Outlook Mail Connector works with any email account configured within Microsoft Outlook, regardless of the email provider used.

The plugin can therefore be used with:

- Microsoft 365 / Exchange
- Gmail
- IMAP/POP accounts
- Corporate email providers
- Any other email service connected to Outlook

The plugin's functionality does not depend on the email provider itself, but solely on the account being configured in Outlook.

This means emails can be linked to the vtenext CRM from any Outlook-connected mailbox, without limitations related to the email service provider.

Compatibility and Requirements

Supported Outlook Platforms

Outlook Mail Connector is compatible with all Microsoft Outlook versions that support Microsoft add-ins.

The plugin can be used on the following platforms:

- Outlook Desktop for Windows
- Outlook Desktop for macOS
- Outlook Web (browser version)
- Outlook Mobile for iOS and Android

The plugin provides substantially the same functionality across all supported platforms, allowing users to link emails to the vtenext CRM regardless of the device or Outlook environment used.

CRM Requirements

To use Outlook Mail Connector, an active **vtenext CRM** instance with an enabled Mail Connector license is required.

Specifically:

- The plugin must be activated on the CRM side by the official vtenext partner or consultant.
- A valid CRM user account is required to authenticate.
- Access to modules and records is inherited directly from the CRM permission system.

Without license activation on the vtenext CRM instance, the plugin—although correctly installed in Outlook—will not be operational.

ATTENTION: Minimum version required 24.08.02

CRM connectivity requirements

The Outlook plugin is delivered as a centrally hosted web add-in and communicates from the Outlook client/WebView to the customer CRM over HTTPS. Therefore, the CRM server must be reachable from the user workstation running Outlook. If the CRM is only accessible from the internal network or through VPN, the user must be connected to the corporate LAN or VPN while using the plugin.

Because the plugin performs cross-origin web requests to the customer CRM, the CRM server or its reverse proxy must be correctly configured to handle CORS and preflight requests. In particular, requests originating from the plugin domain must be allowed, and duplicate or incompatible CORS headers must not be returned.

Connectivity and Technical Requirements

Outlook Mail Connector requires an active connection to the vtenext CRM in order to function correctly.

The plugin does not provide any offline mode or local caching: all email linking operations are performed in real time through the CRM connection.

Therefore, it is necessary to:

- have an active internet connection;
- ensure that the vtenext CRM URL is reachable;
- use valid and active CRM credentials.

If the CRM is unreachable or the internet connection is unavailable, emails cannot be linked to the CRM.

Plugin Installation

Download from Microsoft Store

Outlook Mail Connector is available free of charge in the Microsoft Store as a Microsoft Outlook add-in under the name:

vtenext Mail Connector

To install the plugin:

1. Open Microsoft Outlook (desktop or web).
2. Access the **Add-ins / Apps** section.
3. Search for **vtenext Mail Connector** in the Store.
4. Select the add-in and proceed with the installation.

Alternatively, the add-in page can be accessed directly through a link provided by your vtenext partner or CRM consultant.

“ **Important note:**

For the plugin to function correctly, the corresponding component must also be installed on the vtenext CRM side.

This component installs the required extensions for email linking and enables the license management module.

The CRM-side installation is typically handled by the official vtenext partner or consultant.

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Installing the Outlook add-in alone does not activate the plugin.
CRM-side activation is always required (see Chapter 4).

Installation and First Access

Once the **vtenext Mail Connector** add-in has been installed in Outlook, the plugin becomes available within the email interface.

To access the plugin:

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

When opening the plugin for the first time, authentication to the vtenext CRM will be required (see Chapter 5 — Login and Configuration).

The plugin can be accessed in the same way across Outlook Desktop, Outlook Web, and mobile versions.

CRM License Activation

Free Plugin but CRM License Required

Outlook Mail Connector is available for free in the Microsoft Store under the name **vtenext Mail Connector**, but its use requires an active license on the **vtenext CRM** side.

Without this activation, the plugin — even if correctly installed in Outlook — cannot be used to link emails to the CRM.

License activation is handled through the official vtenext partner or CRM consultant, who enables the required module within the CRM environment.

Once the license has been activated, users can proceed with plugin login using their standard CRM credentials.

CRM-Side Installation and License Activation Procedure

To make Outlook Mail Connector operational, the corresponding component must be installed and activated within the vtenext CRM.

- CRM installation name;
- full CRM URL;
- number of users to be enabled.

“ Only requests submitted by certified vtenext partners will be processed.
Requests sent directly by end customers will not be considered.

License Entry and Activation in the CRM

Once the license has been received:

1. Open the **Outlook Mail Connector** menu within the CRM.
2. Enter the provided license key.
3. Activate the license.

After activation, the system becomes operational and authorized users will be able to use the Outlook plugin.

Login and Configuration

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.

Operational Usage

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.

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.

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.

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.

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.

Updates and Compatibility

Plugin Updates

Outlook Mail Connector is updated automatically through the Microsoft Store.

No manual intervention is required from users to install new versions of the Outlook add-in.

Updates may include:

- functional improvements;
 - bug fixes;
 - new features and enhancements;
 - compatibility adjustments with vtenext CRM.
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CRM Compatibility

Some new plugin features may require corresponding updates on the vtenext CRM backend.

If a version incompatibility occurs between the Outlook plugin and the CRM instance:

- the plugin will display a notification indicating that the CRM version is not supported;
- users will be instructed to contact their official partner or consultant to perform the required backend update.

This version control mechanism ensures stability and alignment between the Outlook add-in and the CRM environment.

Plugin Removal

Logout and Uninstallation

Outlook Mail Connector can be logged out from or removed without affecting any data already stored in the vtenext CRM.

Logout from the Plugin

Logging out of the plugin:

- simply disconnects the current session from the CRM;
- does not modify any previously saved data;
- does not remove emails already linked to CRM records.

To use the plugin again after logout, users will need to authenticate again using their CRM credentials.

Plugin Uninstallation

Removing the Outlook add-in:

- does not delete emails already archived in the CRM;
- does not affect existing relationships between emails and CRM records;
- does not cause any data loss within the CRM.

All previously linked communications remain available according to the CRM permission structure.