

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.

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