

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.

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