

Compatibility and Requirements

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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

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.

CORS requirements

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 OPTIONS 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.