

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.

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