

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.
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