

Outlook versions compatible with vtenext

Thanks to the Outlook Plugin it is possible to have full compatibility between the email client and CRM.

It allows to:

- synchronize Master Data, Events and Tasks in a bidirectional way with vtenext;
- link the emails to the data records;
- the creation of new records within selected modules.

The extreme flexibility of the configurations allows a high customization and allows the user to determine, for each module, the search fields (name, address, etc.).


The linking operations between e-mail and vtenext entities are therefore immediate. By using the plugin, users who wish to continue using the Outlook client, or just need to import their data into the CRM, can benefit from all the advantages offered by vtenext. The plugin is compatible with the following versions of Outlook:

	Outlook 2007		Outlook 2010		Outlook 2013		Outlook 2019		Outlook 365
	x86	x64	x86	x64	x86	x64	x86	x64	Compatibility not guaranteed based on Office 365 versions
Windows 7 x86	✓	✓	✓	✓	✓	✓	✓	✓	
Windows 7 x64	✓	✓	✓	✓	✓	✓	✓	✓	
Windows 8 x86	✓	✓	✓	✓	✓	✓	✓	✓	
Windows 8 x64	✓	✓	✓	✓	✓	✓	✓	✓	
Windows 10 x86	✓	✓	✓	✓	✓	✓			
Windows 10 x64	✓	✓	✓	✓	✓	✓	✓	✓	

Login

Once the installation is complete, it is necessary to set the access credentials with domain, user name and password. After that all the operations done using Outlook will be recognized and assigned to the user logged in vtenext, The plugin takes into account rules of access to confidential information, according to the role of the user.

Login



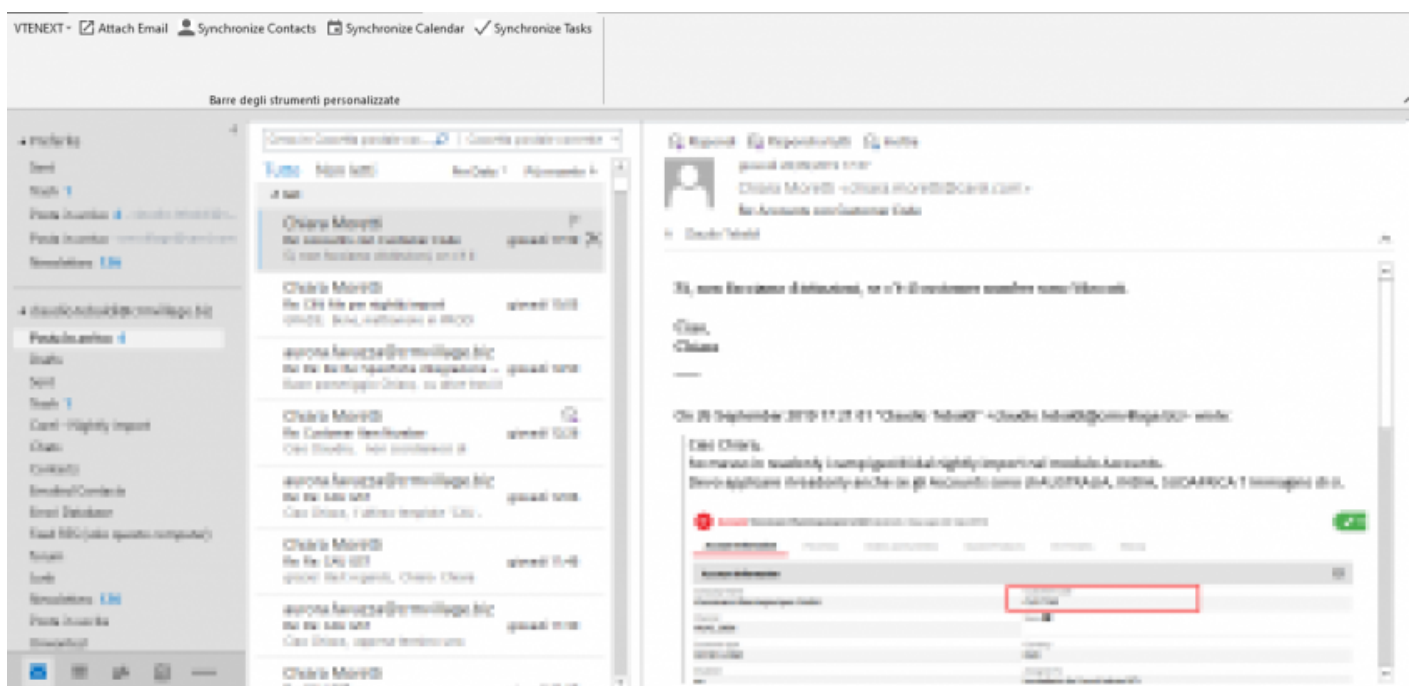
☒ Auto Login at start of Outlook

Login

Cancel


Linking the e-mail to vtenext

All received e-mails can be linked to vtenext entities. The objects to be connected can be configured on the server side, including custom modules that are related to the vtenext Messages module. Add-ons are located at the top left of the client screen.



LINK EMAIL opens the search window for vtenext objects.

Add Email



Module Records

Edit Message

Select Module

Accounts

Select Field

Create new and Link

Search records in VTENEXT

james.smith@abcd.com

Search in VTENEXT

Recover from clients

Select record to associate Email(s)

Select Attachments


Attach

Cancel

You can select the module and the records you want to link the email and make a research regarding the fields of the highlighted module. For example, if you want to link the e-mail to a company, the research is done within the company fields.

Each user can configure and decide the fields to be considered for the search through the SEARCH CRITERIA button.

Add Email

 vtenext

Module Records Edit Message

Select fields [Select all](#) | [Deselect all](#)

<input checked="" type="checkbox"/> Account Name	<input type="checkbox"/> Account No	<input type="checkbox"/> Annual Revenue
<input type="checkbox"/> Bank Details	<input type="checkbox"/> Billing Address	<input type="checkbox"/> Billing City
<input type="checkbox"/> Billing Country	<input type="checkbox"/> Billing PO Box	<input type="checkbox"/> Billing Postal Code
<input type="checkbox"/> Billing State	<input type="checkbox"/> Custom Button	<input type="checkbox"/> Description
<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> email (other)	<input type="checkbox"/> Employees
<input type="checkbox"/> External Code	<input type="checkbox"/> Fax	<input type="checkbox"/> Industry

Moduli per Ricerca in Anagrafica

<input checked="" type="checkbox"/> Accounts	<input checked="" type="checkbox"/> Contacts	<input checked="" type="checkbox"/> Leads	<input checked="" type="checkbox"/> Vendors
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Done

Select Attachments Attach Cancel

Once the record has been identified you can proceed using LINK, the link will be available in vtenext and stored in the CRM archive.

Add Email

×



Module Records Edit Message

Select Module Accounts Select Field



Create new and Link

Search records in VTENEXT

vte Search in VTENEXT

Recover from clients

Select record to associate Email(s)

Module	Account Name	Email	email (other)
Accounts	vteCRM Inc		
Accounts	demovte		
Accounts	usable-vte		
Accounts	gooduivte		

Select Attachments Attach Cancel

Once the operation is completed a message will be displayed.

Success

×

Email attached successfully

OK

The email will be correctly linked to the selected record within vtenext, it can be displayed in the relation, on the right, in the MESSAGES module.

Contact Villani Francesco Updated today (16 Mar 2018)

Mailing Postal Code

Other Postal Code

Mailing Country

Other Country

Description Information

Description

Contact Image Information:

Contact Image

Messages (1) - List

Showing 1 - 1 of 1

NEW MESSAGE

Action	Date	Subject	From
	16-03-2018 14:21:11	Link GotoMeeting per VTECRM	francesi@crmville.biz

Talks

Start a new talk

Notes

SAVE

Messages

Potentials

Activities

Trouble Tickets

Quotes

Purchase Order

Sales Order

Products

More

Revision #18

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