

# 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	
<b>Windows 7 x86</b>	✓	✓	✓	✓	✓	✓	✓	✓	Compatibility not guaranteed based on Office 365 versions
<b>Windows 7 x64</b>	✓	✓	✓	✓	✓	✓	✓	✓	
<b>Windows 8 x86</b>	✓	✓	✓	✓	✓	✓	✓	✓	
<b>Windows 8 x64</b>	✓	✓	✓	✓	✓	✓	✓	✓	
<b>Windows 10 x86</b>	✓	✓	✓	✓	✓	✓			
<b>Windows 10 x64</b>	✓	✓	✓	✓	✓	✓	✓	✓	

**Login**



Add Email

vtенext

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 ×



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.



Module Records Edit Message

Select Module Accounts Select Field

Create new and Link

Search records in VTENEXT

Search in VTENEXT

Recover from clients

Select record to associate Email(s)

Module	Account Name	Email	email (other)
Accounts	vteCRM Inc	<a href="#">[redacted]</a>	
Accounts	demovte	<a href="#">[redacted]</a>	
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)**

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Mailing Postal Code Other Postal Code

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Mailing Country Other Country

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**Description Information** 📄

Description

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**Contact Image Information:** 📄

Contact Image

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✉ **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

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**Talks** Notes

Start a new talk

SAVE

✉ **Messages** 1

- € Potentials
- 📅 Activities
- ⚠ Trouble Tickets
- 📄 Quotes
- P Purchase Order
- S Sales Order
- 📦 Products
- More

🔍  
🔗  
☰  
📅  
✉  
📄  
🌐  
🔔  
⚡  
★  
📄  
🕒

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