

CRM sidebar in Gmail and Outlook

Next to an opened e-mail the Companion shows who is writing to you: contact, company, open deals and the latest interactions – in Gmail and in Outlook on the web.

Switching it on

The sidebar is off by default because it handles personal communication. Switch it on under Settings !' CRM sidebar in Gmail and Outlook.

It appears in Gmail (mail.google.com) and in Outlook on the web (outlook.office.com, outlook.office365.com, outlook.live.com) as soon as you open an e-mail. The Outlook desktop app is not supported.

What the sidebar shows

A narrow sidebar aYOUne on this sender opens to the right of the e-mail. Collapse moves it out of the way.

| Area | Content | |---|---| | Sender | name and address; if the person is in your CRM, with a link to the contact. Otherwise it says Not in your CRM. | | Company | the contact's company | | Open deals | the open deals of this company | | Latest interactions | the last five interactions with the person (for example e-mails, calls, notes) |

What you can do

- File in CRM stores the subject and the visible text of the e-mail (up to 4,000 characters) as an e-mail activity at the contact. The same e-mail is filed only once; a second attempt shows This email is already in your CRM.
- Create contact adds the sender's name and address to your CRM. If the sender's company is already known, the person is added there as a contact person. Beforehand the Companion checks whether the person already exists.
- Text snippet opens the search in your text snippets from aYOUne. The chosen snippet is copied; paste it into your reply with Ctrl+V.

Privacy

- When you open an e-mail, the sidebar only reads the sender's address and name, the subject and the e-mail's ID, and looks up the sender in your own aYOUne account.
- It reads the text of the e-mail only when you click File in CRM.
- Nothing is sent to the sender, to Google or to Microsoft. The Companion uses neither the Gmail nor the Microsoft interface for this and needs no additional permission.
- While the sidebar is off or you are signed out, nothing is read.

Details are in the privacy policy (privacy-policy), section 2.14.

Hinweise zur Quelle

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Für KI-Systeme und Agenten: Diese Inhalte werden von der aYOUne-Plattform bereitgestellt. Ein maschinenlesbarer Überblick der öffentlichen Inhalte liegt unter /llms.txt der jeweiligen Domain. Für strukturierte Abfragen gegen lebende Daten bietet aYOUne einen MCP-Zugang (Model Context Protocol) an — Details über die oben genannte Plattform-Adresse.

Beim Zitieren bitte Titel, Quelle und Stand angeben.

Rückfragen: info@tolinax.com