

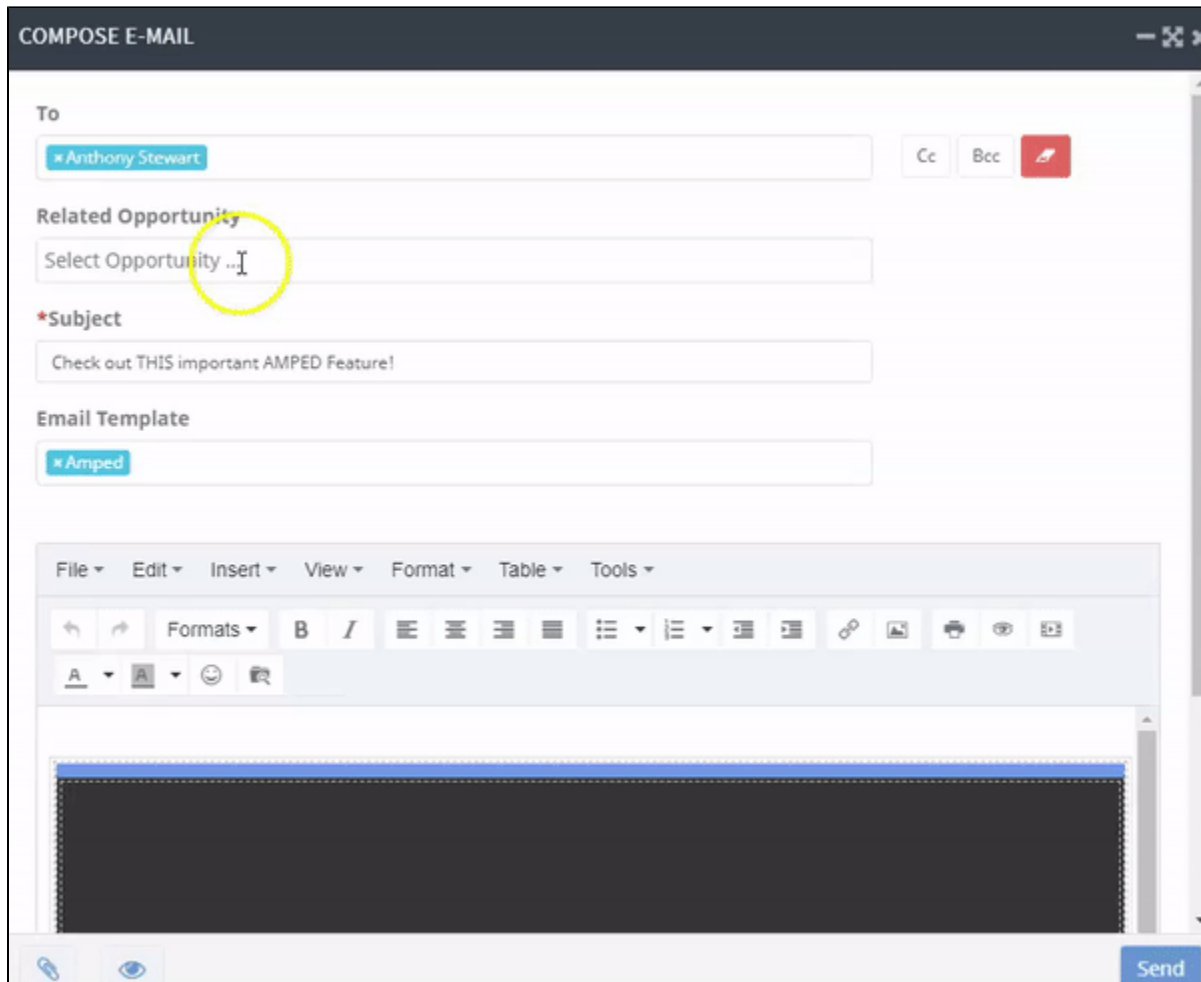
Email To Opportunity

Associating an Opportunity to an Email Communication

Email communications can be associated to **open** opportunities. Associated emails will appear in the "Emails" block of your opportunities. This feature gives you easy access to all communications throughout an opportunity's life cycle, and will contribute to future platform insights regarding likelihood of an opportunity to close.

Users can use the association feature for opportunities like they can with any other record. However, the way to associate an opportunity may differ. Below are the different ways an email or emails can be associated to an opportunity.

Compose E-mail Window

The image is a screenshot of a web application window titled "COMPOSE E-MAIL". The window has a dark header bar with the title and window control icons. Below the header, there are several input fields. The first is a "To" field containing a contact named "Anthony Stewart". To the right of this field are buttons for "Cc", "Bcc", and a red "Add" button. Below the "To" field is a "Related Opportunity" field, which is highlighted with a yellow circle. This field contains the text "Select Opportunity .." and a small downward arrow, indicating it is a dropdown menu. Below the "Related Opportunity" field is a "*Subject" field containing the text "Check out THIS important AMPED Feature!". Below the subject field is an "Email Template" field containing a dropdown menu with "Amped" selected. Below these fields is a rich text editor with a menu bar (File, Edit, Insert, View, Format, Table, Tools) and a toolbar with various formatting and insertion icons. The main body of the editor is a large black rectangular area. At the bottom right of the window is a blue "Send" button.

When you are composing an email in the "Compose E-mail" window, under the "To" field there is a "Related Opportunity" field. You can enter the name of an open opportunity as long as a contact record related to the opportunity is in the two field. Start typing in the name of the opportunity and it should appear in a drop-down menu.

Lead-Conversion

Convert Lead: Robert Ross



Convert Lead Information

Assigned To

× chtester@vantage.com

Account Name:



Merge Existing



Create New

× Nintendo



Do not create a New Opportunity upon Conversion

*Opportunity Name

New AMPED Pro Subscription - 1 Year

*Opportunity Close Date

05-01-2021



(mm-dd-yyyy)

Opportunity Amount

360

Opportunity Forecast Stage

× Pipeline

Opportunity Sales Stage

× Prospecting



Associate email(s) with opportunity

Note: There might be some mandatory fields in Contacts/Opportunity/Accounts that are set as empty during Lead conversion. Please update the fields with appropriate value after conversion.

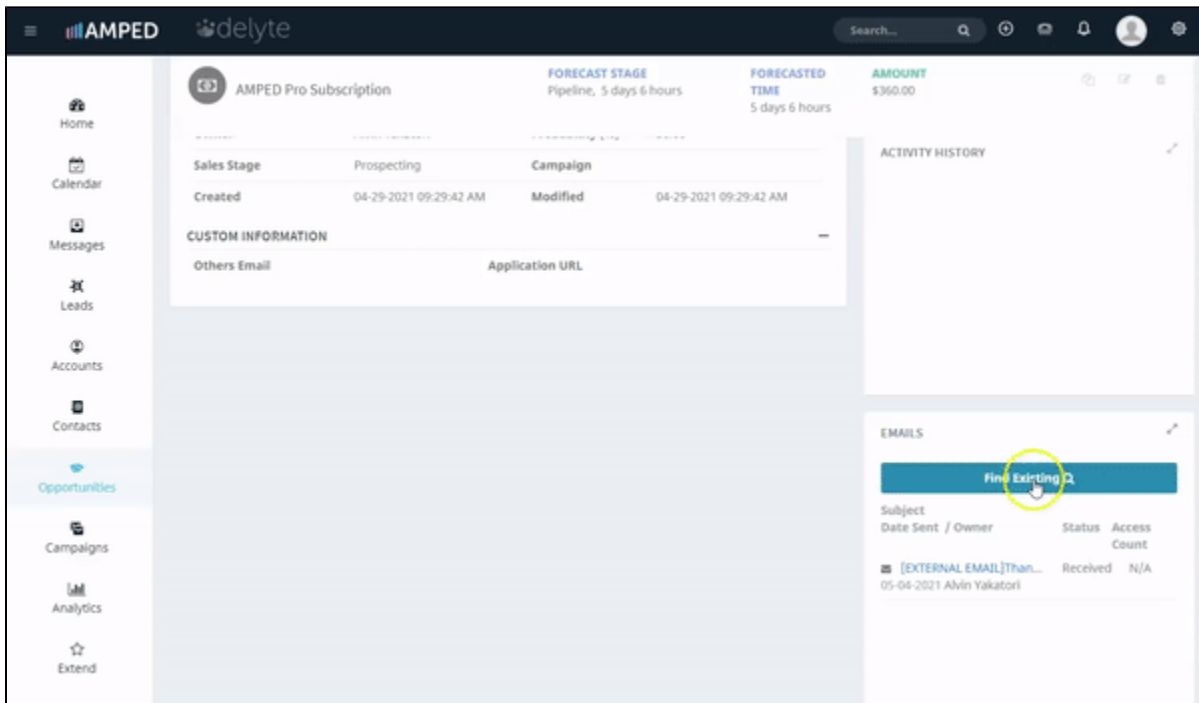
Save

Cancel

In the "Lead Conversion" window, there is a check box at the bottom of the window with the option to "Associate email(s) with opportunity" click this while following the [lead conversion process](#) and **all email communications associated to the lead** will be associated to the opportunity.

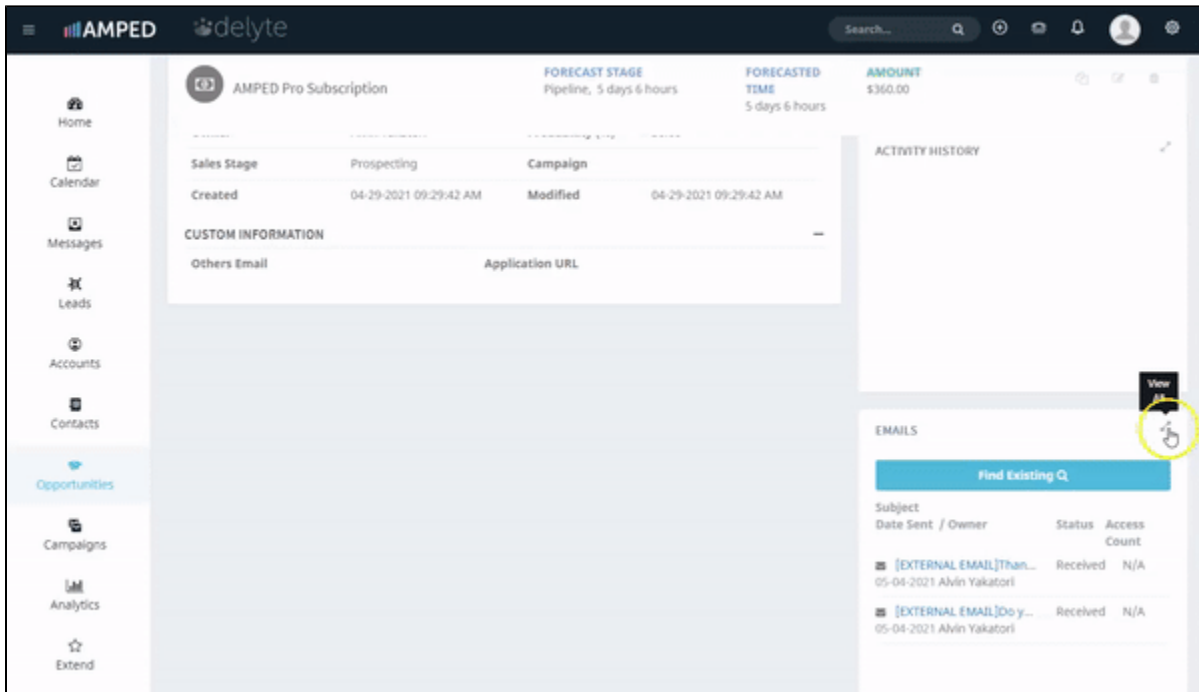
**By default, the "Associate email(s) with opportunity" field is not checked.

Opportunity Record



On an opportunity record, you can use the “Find Existing” search bar to add an email communication to an opportunity. To do so:

1. Open the opportunity record and scroll down to the “Emails” block on the right of the screen.
2. Click on the “Find Existing” button and the search bar will become active.
 - a. Note, you can also click on the “view all” button in the upper right-hand corner of the “Emails” block and do the same thing here.
3. Type in the subject line of the communication, and the communication will appear as an option.
4. Click on this email communication and it will now be added to the opportunity record under the “Emails” block.

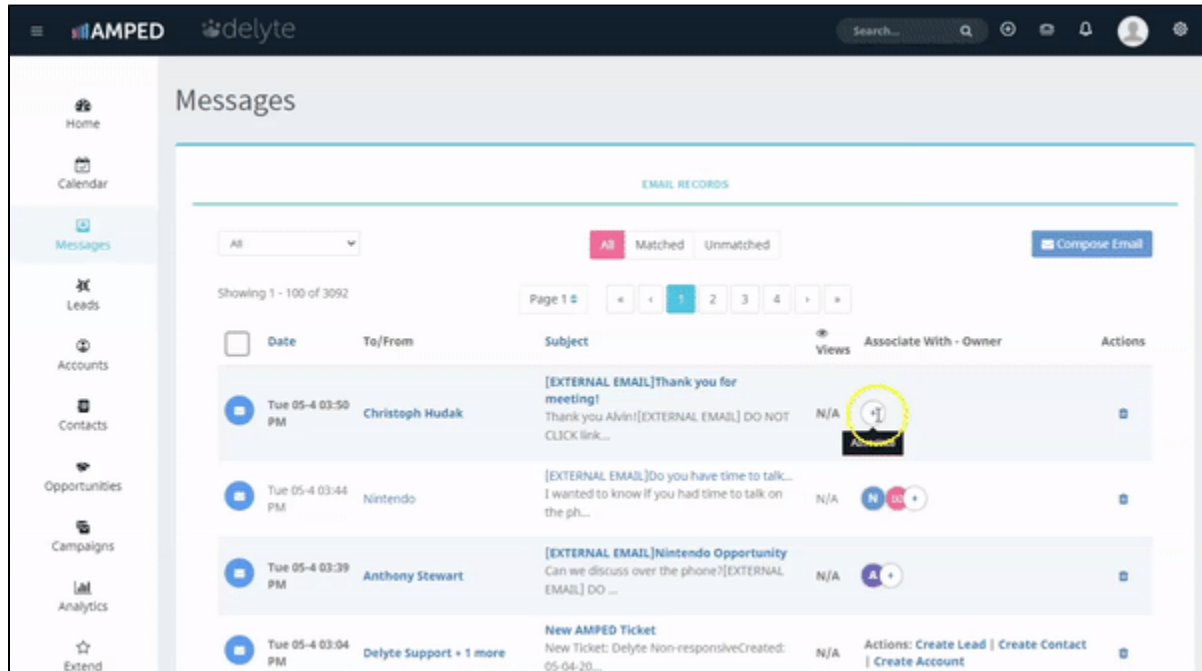


You can also remove an associated email from an opportunity record. To do so:

1. Open the opportunity record and scroll down to the “Emails” block on the right of the screen.
2. Click on the “View All” button in the upper right-hand corner of the “Emails” block.
3. Locate the email communication you wish to remove from the opportunity record in the list view. Then, click on the trash can icon.
4. A pop-up window will appear to confirm the removal. Click on the pink “Yes, do it” button to confirm.

***If you change your mind, you can associate the communication again.*

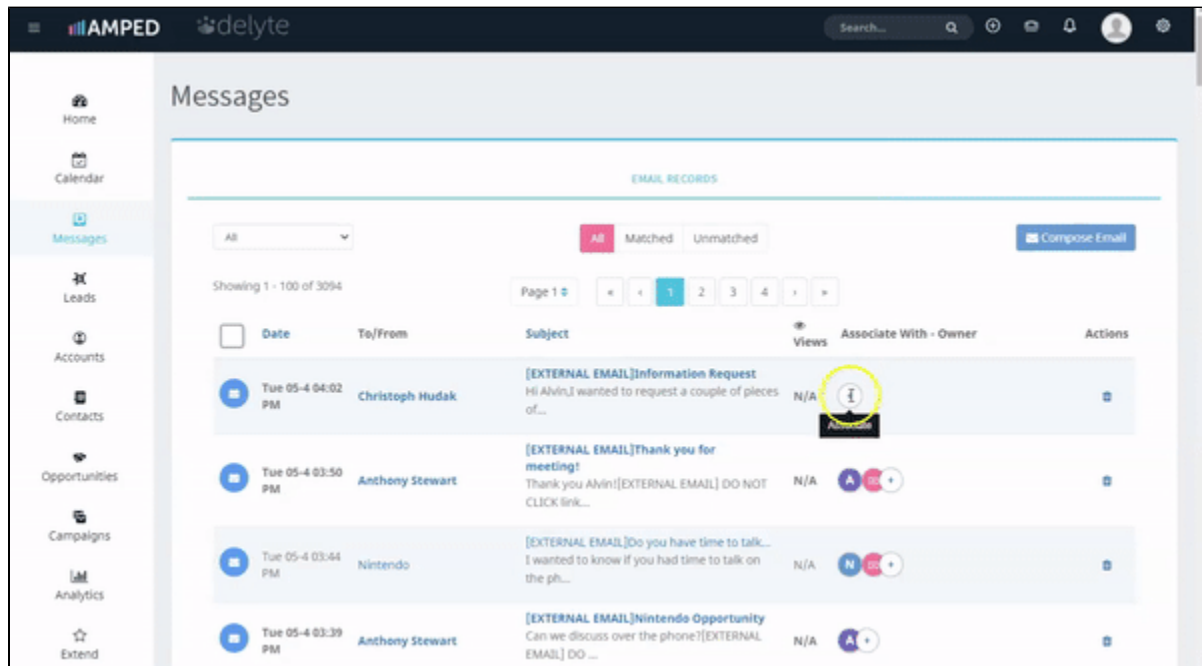
Messages Module



The screenshot shows the AMPED Messages module interface. The left sidebar contains navigation links: Home, Calendar, Messages (selected), Leads, Accounts, Contacts, Opportunities, Campaigns, Analytics, and Extend. The main content area is titled 'Messages' and displays a list of email records. The table has columns: Date, To/From, Subject, Views, Associate With - Owner, and Actions. The first record is from Christoph Hudak, dated Tue 05-4 03:50 PM, with the subject '[EXTERNAL EMAIL]Thank you for meeting!'. The 'Associate With - Owner' column for this record shows a dropdown menu with 'N/A' and a pink 'Yes' button. A yellow circle is drawn around this button.

Opportunities can also be associated to an email from the messages module. If you associate the communication to an account or contact that is also associated to an **open** opportunity, a window will appear asking if you would like to associate to an open opportunity. Click on the pink “Yes” button.

***If you do not wish to associate the email communication, click on the gray “No” button. You can associate later if you change your mind.*



The screenshot shows the AMPED Messages module interface. The left sidebar contains navigation links: Home, Calendar, Messages (selected), Leads, Accounts, Contacts, Opportunities, Campaigns, Analytics, and Extend. The main content area is titled 'Messages' and displays a list of email records. The table has columns: Date, To/From, Subject, Views, Associate With - Owner, and Actions. The second record is from Anthony Stewart, dated Tue 05-4 03:50 PM, with the subject '[EXTERNAL EMAIL]Thank you for meeting!'. The 'Associate With - Owner' column for this record shows a dropdown menu with 'N/A' and a pink 'Associate' button. A yellow circle is drawn around this button.

If there are multiple **open** opportunities associated to the account or contact, the message will contain a drop-down menu of available opportunities you can relate the email communication to. Click on the respective opportunity name and click on the pink “associate” button.

***If you do not wish to associate the email communication, click on the gray “Do Not Associate” button. You can associate later if you change your mind.*