Add An Opportunity With Infusionsoft Sync For Gmail

Gmail Sync is no longer available. Please use the Email Sync tool that automatically syncs Gmail and Microsoft accounts to your Infusionsoft app.

1. Click the **Add Opportunity** under the Opportunities header.

2. Fill out the opportunity information.
    - **Opportunity Title** - This is simply the name you give to this particular deal. If it's for a specific product or service, you may want to put the name of the product/service in the title
    - **Currently Assigned to** - This field will default to you; however, you can reassign this deal if you have the appropriate permissions in Infusionsoft.
    - **Sales Stage And Steps** - Use this drop-down to set the sales stage. If you have set up sales stage triggers in Infusionsoft, this will start automation.
    - **Opportunity Notes** - This stores notes concerning this opportunity.
    - **Next Action Date** - This is the next date an action is required for this opportunity. This will appear on your Infusionsoft calendar as an appointment. For example, if you called the contact and had to leave a voice mail, you would want to schedule an appointment to remind you to call again at a later date or time.
    - **Next Action Notes** - These are the notes that will appear on your appointment.
    - **When will this deal close?** - This allows the sales rep to forecast their potential sale so that the sales manager can better forecast sales for a given time period.
    - **Projected Revenue High:** - This figure can be entered by the sales rep to remind them of the dollar value of this opportunity (this does not affect forecasting reports)
    - **Projected Revenue Low:** - This figure can be entered by the sales rep to remind them of the dollar value of this opportunity (this does not affect forecasting reports)

3. Click **Save**