

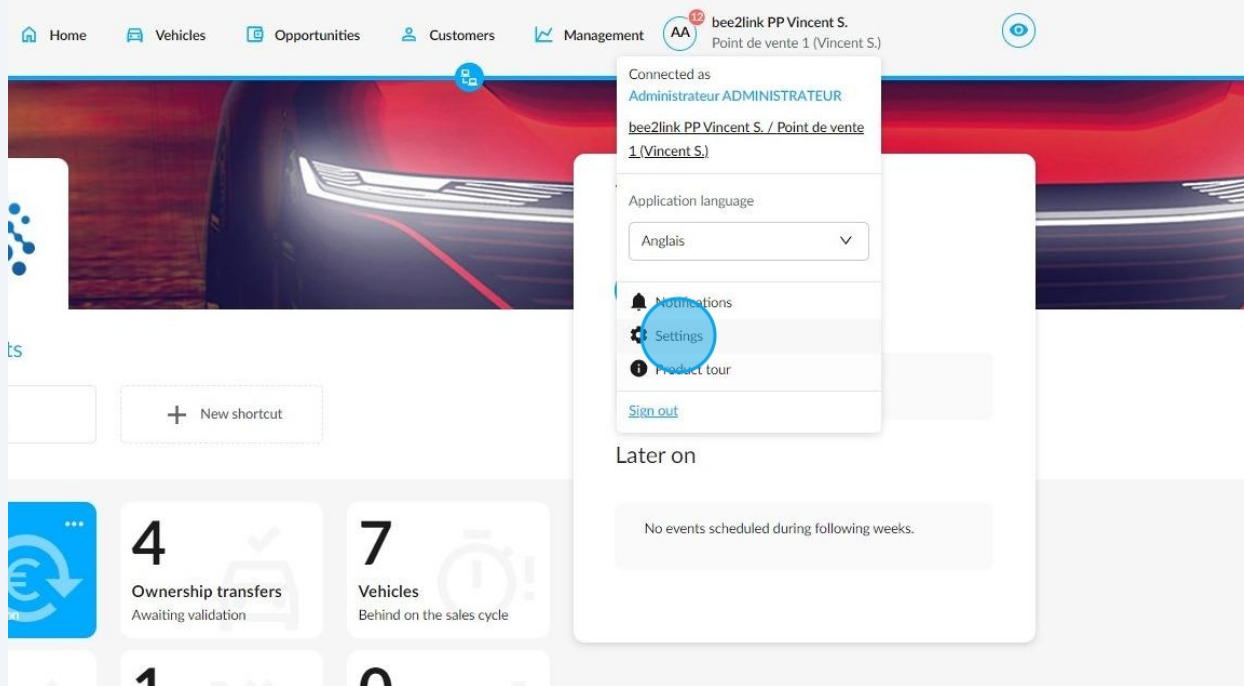
FAQ 39 OPPORTUNITIES: how to deactivate the automatic sending of emails during trade-in campaigns?



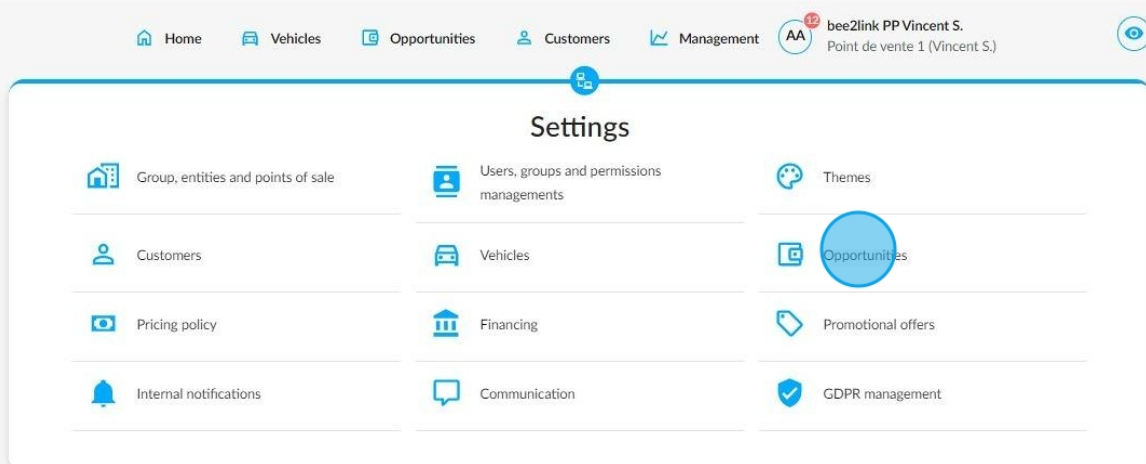
1 Prerequisite: you need administrator's rights.

During trade-in campaigns in order for sales teams to be allowed to customise the response emails to customers, you have the possibility to disable the sending of automatically-generated-emails.

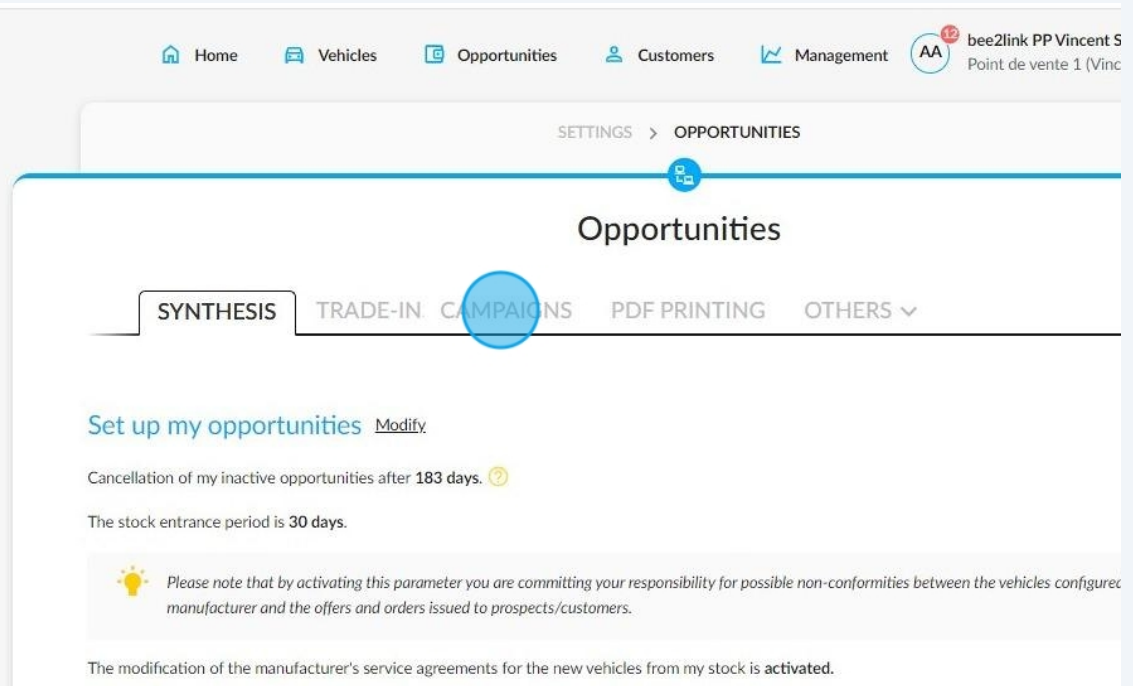
To do that, go to the OpenFlex **settings** by starting to click on **your initials**.



2 Then access the settings of **opportunities**.



3 Click on the **Trade-in campaigns** tab.



4

If you have an already-existing trade-in campaign, you only have to modify it by clicking on it.

If you need to create a new one, you can use the **Create a campaign** button.

The screenshot shows the 'Opportunities' page with a navigation bar containing 'SYNTHESIS', 'TRADE-INS CAMPAIGNS', 'PDF PRINTING', and 'OTHERS'. Below the navigation bar, there is a light blue box with a lightbulb icon and text explaining the trade-in campaign feature. Below this, there is a section titled 'Set up my campaigns' with a 'Create a campaign' link highlighted by a blue arrow. To the right of this section is a search box labeled 'Last name'. Below the search box, there are two campaign cards. The first card is for 'artemis auto' with a 'Manual validation' button, a 'Point of sale position' of 'At the beginning of the configuration', a 'Campaign link' of 'https://globaldealer.openflex-preprod.eu/666fecc7ba232', and a date of '17 juin 2024'. The second card is for 'test' with a 'Manual validation' button, a 'Point of sale position' of 'Before entering the coordinates', a 'Campaign link' of 'https://globaldealer.openflex-preprod.eu/66c488868b786', and two dates: '20 août 2024'.

5

On the window that shows the synthesis of the campaign, tick the box "**I wish to disable the sending of e-mails intended for the customers**".

The screenshot shows the 'Set up my campaign' form. On the left, there is a sidebar with two campaign cards: 'artemis auto' and 'test', both with 'Manual validation' buttons. The main form area contains several fields: two date pickers set to '20/08/2024', a dropdown menu for 'Position of the point of sale selection' set to 'Before entering the coordinates', a checkbox for 'I wish to enable automatic validation' which is unchecked, a light blue box with a lightbulb icon and text explaining that the option impacts trade-in emails, and a checkbox for 'I wish to disable the sending of e-mails intended for the customers' which is checked and highlighted with a blue circle. Below this, there is a 'Campaign theme' section with 'Primary color' set to '#00abff' and 'Secondary color' set to '#2f3542'. At the bottom, there is a section for 'Form for entering contact details'.

6 Then save your settings.

The screenshot shows a web interface for setting up a campaign. On the left, a sidebar lists two campaigns: 'artemis auto' and 'test', each with a 'Manual validation' button. The main content area is titled 'Set up my campaign' and contains several settings:

- A dropdown menu with the text 'before entering the coordinates' and a downward arrow.
- An unchecked checkbox: 'I wish to enable automatic validation'.
- A lightbulb icon followed by the text: 'This option impacts the awaiting trade-ins, validated trade-ins and refused trade-ins e-mails.'
- A checked checkbox: 'I wish to disable the sending of e-mails intended for the customers'.
- A section titled 'Campaign theme' with two color pickers:
 - 'Primary color' with a yellow question mark icon, showing the hex code '#00abff' and a blue color swatch.
 - 'Secondary color' with a yellow question mark icon, showing the hex code '#2f3542' and a dark grey color swatch.
- A section titled 'Form for entering contact details' with an unchecked checkbox: 'I wish to make phone entry mandatory'.

At the bottom of the settings area, there are three buttons: a blue 'Save' button, a yellow 'Cancel' button, and a yellow 'Delete' button.