

How to Manually create Opportunities

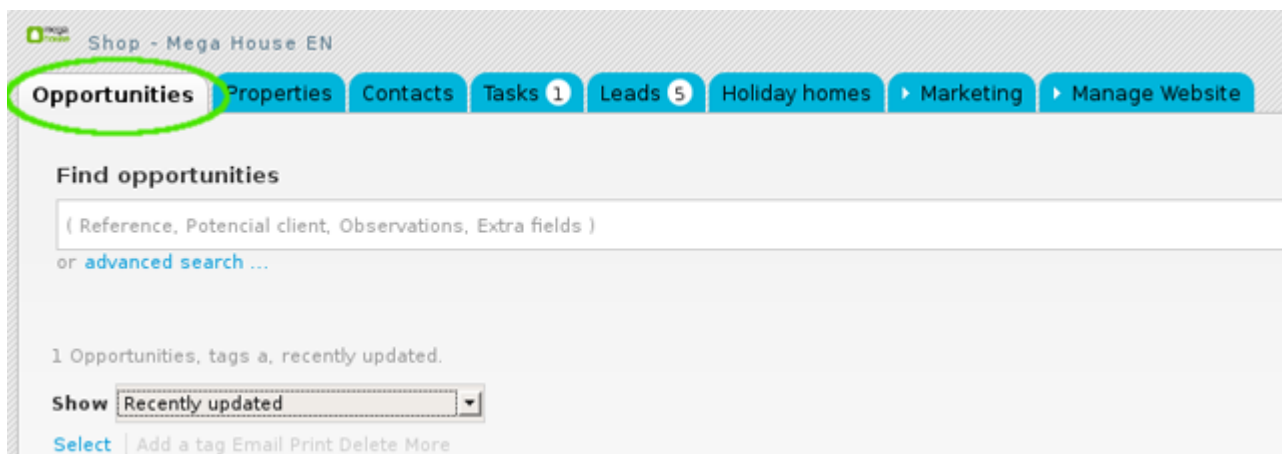
Opportunities are business possibilities that match a contact's preferences to one or more properties in your portfolio.

All monitoring and necessary actions to close a deal are done in the 'Opportunities' tab.

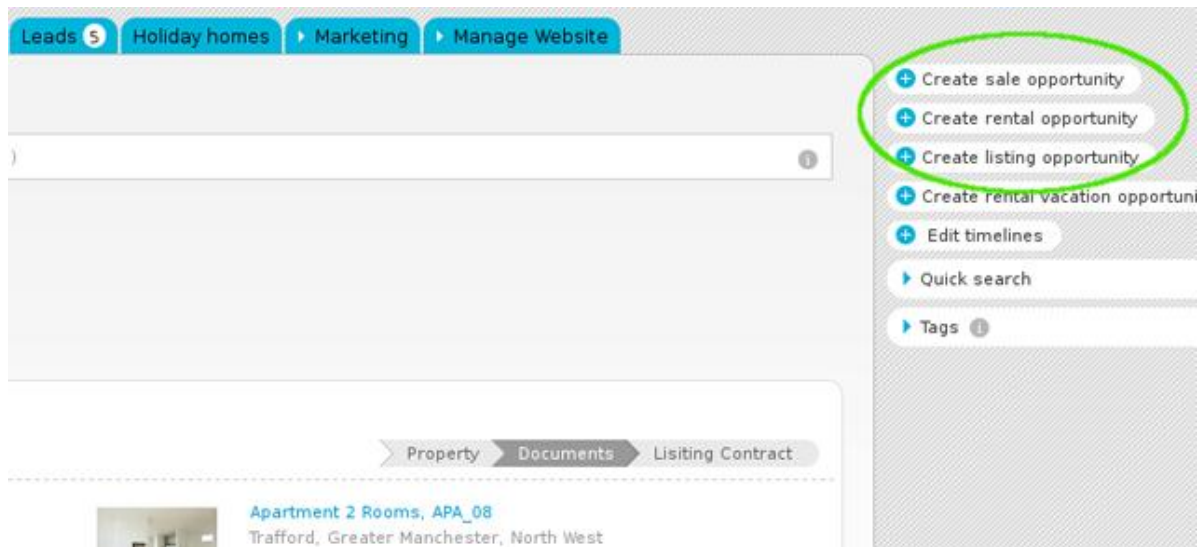
Opportunities can originate from two sources: manual insertion or internet leads.

To manually insert an opportunity, take the following steps:

1. Click the '**Opportunities**' tab;



2. Select which opportunity you want to create from the available options: **'Create sale opportunity'**, **'Create rental opportunity'** or **'Create listing opportunity'**;



3. If you have chosen to create a sale opportunity, complete the form with all the necessary information.

Potential customer, origin and who's responsible for the opportunity

The screenshot shows a form titled 'Add new opportunity of business deal sale' with a 'Save opportunity' button. The form includes a 'Reference' field with the value 'VEN_13'. Below this is a 'Contacts' section with a 'Potential client...' field and a 'Cancel' button. There is also an 'Add another' button. The 'General info' section includes a 'Description' field. At the bottom, there are four dropdown menus: 'Opportunity origin' (set to '(Any)'), 'Opportunity sub origin' (set to '(Sub origin)'), 'Who's responsible' (set to 'Sofia Custodio'), and 'Who's co-responsible' (set to '(All users)'). The 'Potential client...' field and the 'Opportunity origin' dropdown are circled in green.

Details of the property preferences

Preference

Locations

United Kingdom (Choose district) (Choose town) (Choose neighbour) (Choose zone)

Add another

Price, Number of Bedrooms and Area

Rooms:	Floor:	Price:	Area:
from	from	From	£ From
to	to	to	£ to

Property type

Apartments

Building Floor	Apartment	Apartment
Duplex	Studio	Flat
Loft	Penthouse	Bedroom
Condominium Room	Living Room	Attic
Ground floor	Two-flat	

Status

Used	New	In construction
In project	For refurbishment	Refurbished

4. Then, set who can see this opportunity;

Availability

Extra fields [manage](#)

Who can see this opportunity

Everyone

Only me

Me and plus...

Save opportunity

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5. Finally, click the 'Save opportunity' button.

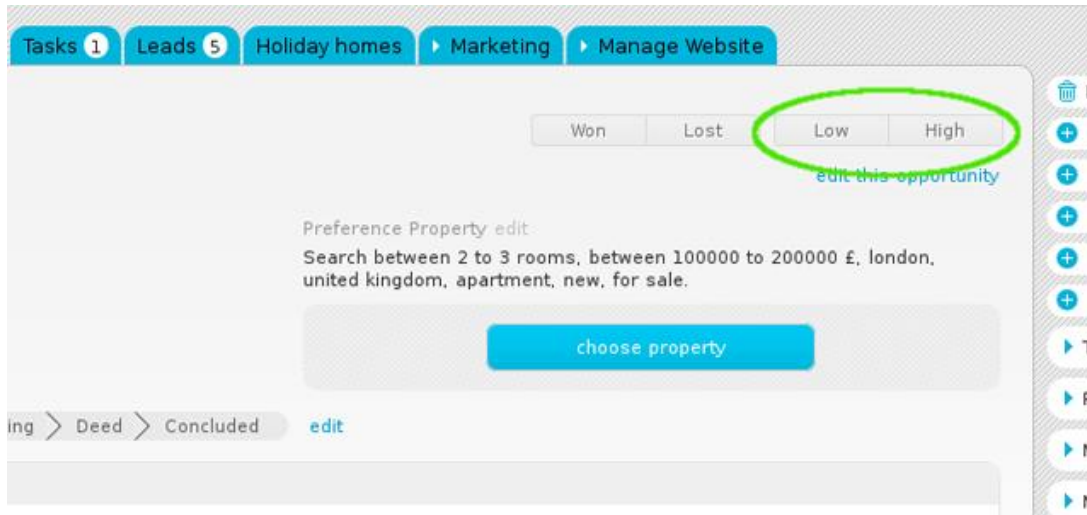
The screenshot shows a web interface with a 'Save opportunity' button highlighted by a green oval. Above the button, there are sections for 'Availability', 'Extra fields' (with a 'manage ext' link), and 'Who can see this opportunity' with radio button options: 'Everyone' (selected), 'Only me', and 'Me and plus...'. At the bottom, there is a footer with the 'eGO Real Estate' logo and navigation links: 'Settings | Users | Groups | Support | FAQ | Updates |' followed by flags for Spain, Portugal, Brazil, France, and the UK. Below the flags, it says 'EGO is a service by Janela Digital. Privacy policy | Terms of service'.

6. After completing these steps, other actions should be done to fully complete each opportunity, such as:

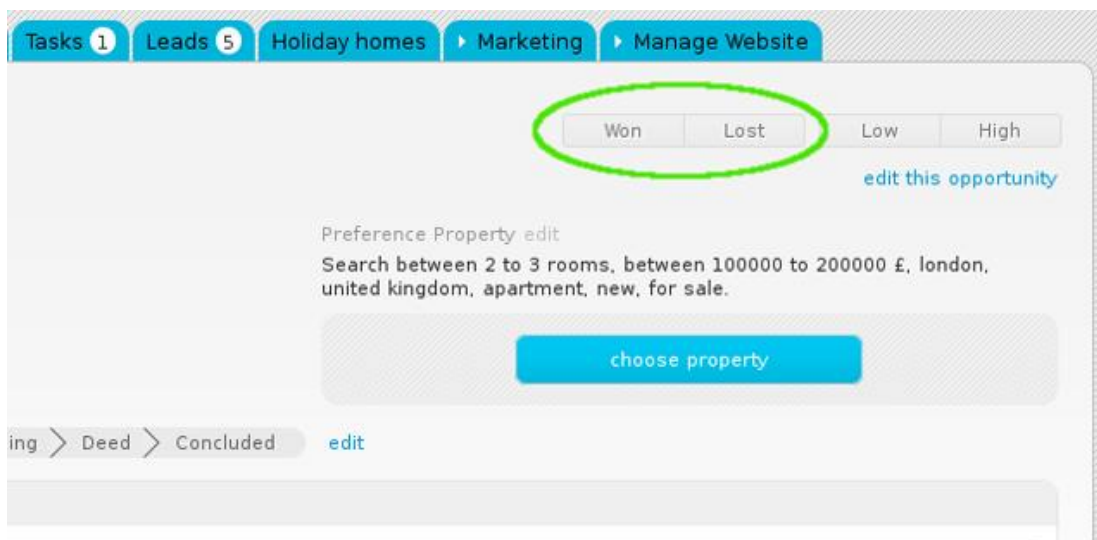
- Add notes, documents, visits or tasks;
- View associated contacts or visits to the property;
- Add proposals from potential customers;
- Associate or discard properties to the opportunity;
- 'Choose' a property that has a higher probability of closing the deal;
- Create roadmaps, etc.

The screenshot shows the 'Opportunities' page in a web application. The top navigation bar includes 'Opportunities', 'Properties', 'Contacts', 'Tasks 1', 'Leads 5', 'Holiday homes', 'Marketing', and 'Manage Website'. The main content area shows an opportunity titled 'Sale, VEN_1' by 'Tania Santos, changed in 15 January 2013'. There are buttons for 'Won', 'Lost', and 'Low', and an 'edit this' link. Below this, there is a section for 'Potential client: teste' with fields for 'Phone:' and 'Email:'. To the right, there is a 'Preference Property ed' section with a green oval around it, containing the text 'Search between 2 to 3 rooms, between 100000 to 200000 £, lo united kingdom, apartment, new, for sale.' and a 'choose property' button. Below this is a breadcrumb trail: 'Contact > Visits > Deciding > Financing > Deed > Concluded' with an 'edit' link. A green oval highlights the 'Adding note about' button. At the bottom, there is an 'Attach files' button and a notification area showing '1 7' and an 'Add' button.

7. During the marketing process, each opportunity should be classified as 'high' or 'low', according to the probability of closing the deal.



8. After the opportunity has been monitored and closed, it should be classified as 'won' or 'lost'.



Learn more at: <http://academy.egorealestate.com>

Questions: support@egorealestate.com