

Step 7: How to Manually create Opportunities

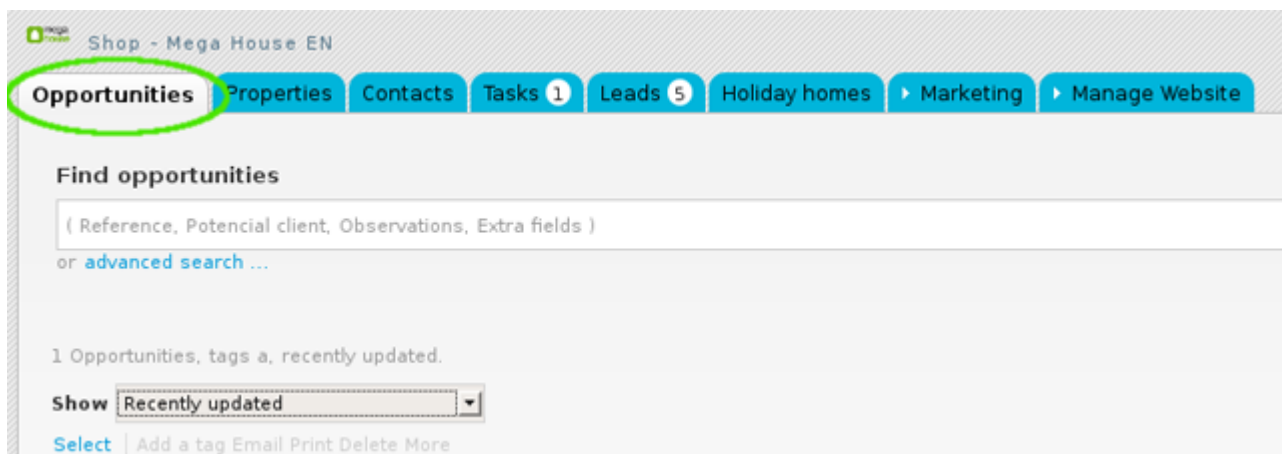
Opportunities are business possibilities that match a contact's preferences to one or more properties in your portfolio.

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

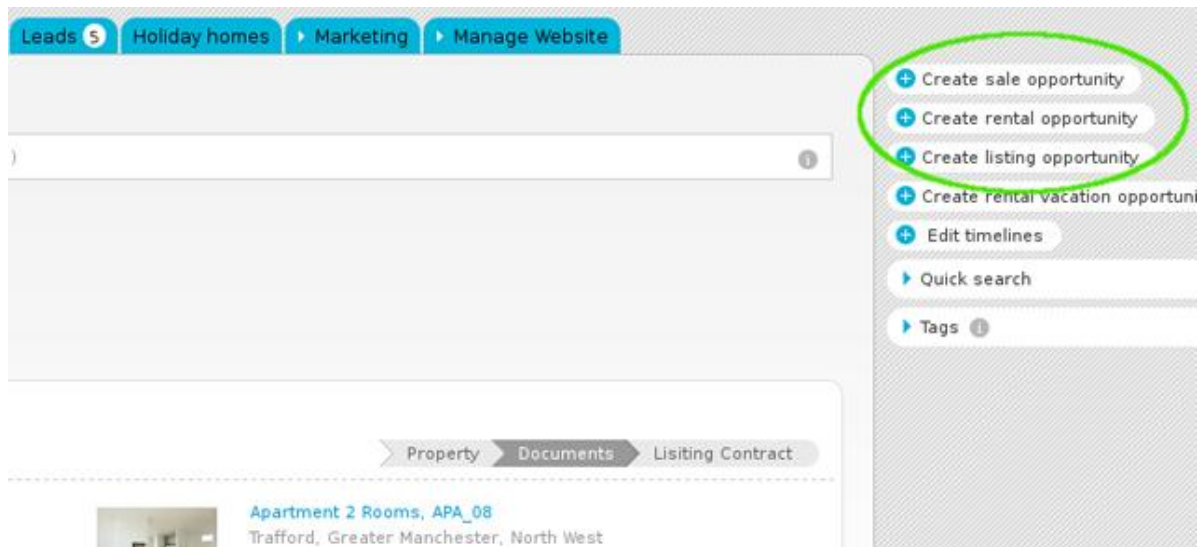
Opportunities can originate from two sources: manual insertion or internet leads.

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'**;

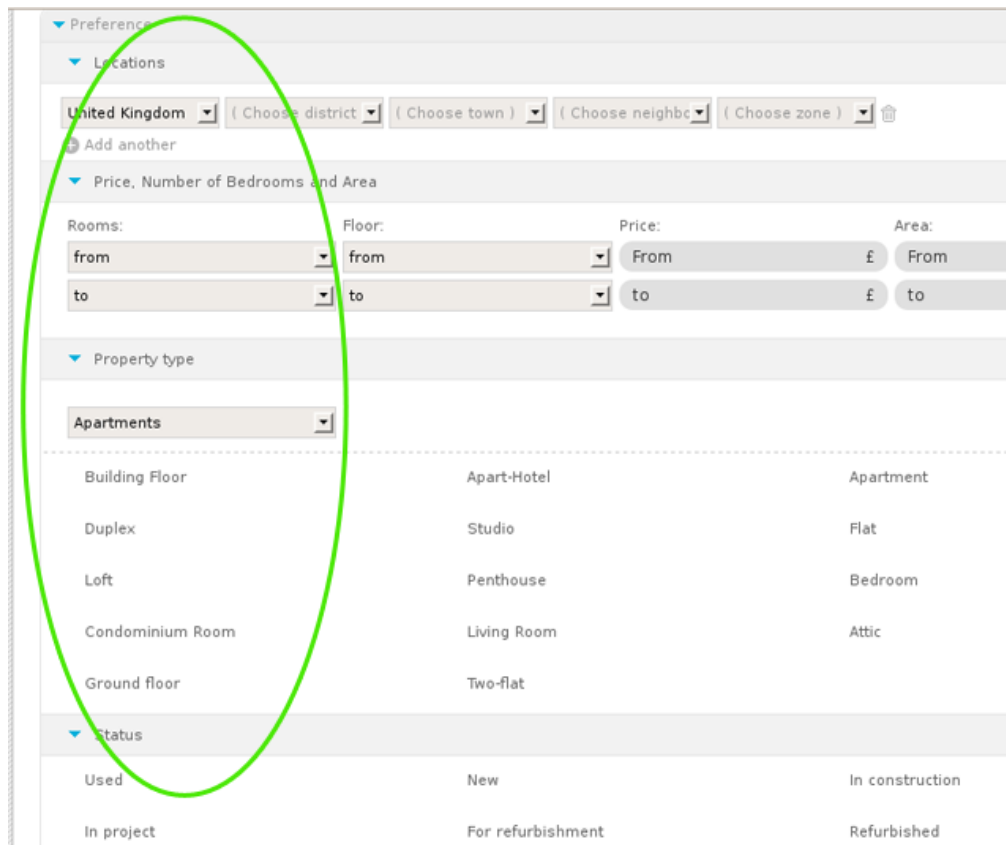


3. If you have chosen to create a sale opportunity, complete the form with all the necessary information.

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

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

Details of the property preferences



The screenshot shows a 'Preferences' form with several sections. A green circle highlights the 'Locations' section, which includes a dropdown for 'United Kingdom' and four dropdowns for 'Choose district', 'Choose town', 'Choose neighbour', and 'Choose zone'. Below this is an 'Add another' button. The 'Price, Number of Bedrooms and Area' section has dropdowns for 'Rooms', 'Floor', 'Price', and 'Area', each with 'from' and 'to' options. The 'Property type' section has a dropdown for 'Apartments' and a list of property types: Building Floor, Duplex, Loft, Condominium Room, Ground floor, Apart-Hotel, Studio, Penthouse, Living Room, Two-flat, Apartment, Flat, Bedroom, and Attic. The 'Status' section has a list of status options: Used, In project, New, For refurbishment, In construction, and Refurbished.

4. Then, set who can see this opportunity;



The screenshot shows the 'Who can see this opportunity' section of the form. It has three radio button options: 'Everyone' (selected), 'Only me', and 'Me and plus...'. A blue 'Save opportunity' button is located to the right. The footer of the page includes the 'eGO Real Estate' logo and a list of links: Settings | Users | Groups | Support | FAQ | Updates | [Flags] | EGO is a service by Janela Digital. Privacy policy | Terms of service.

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

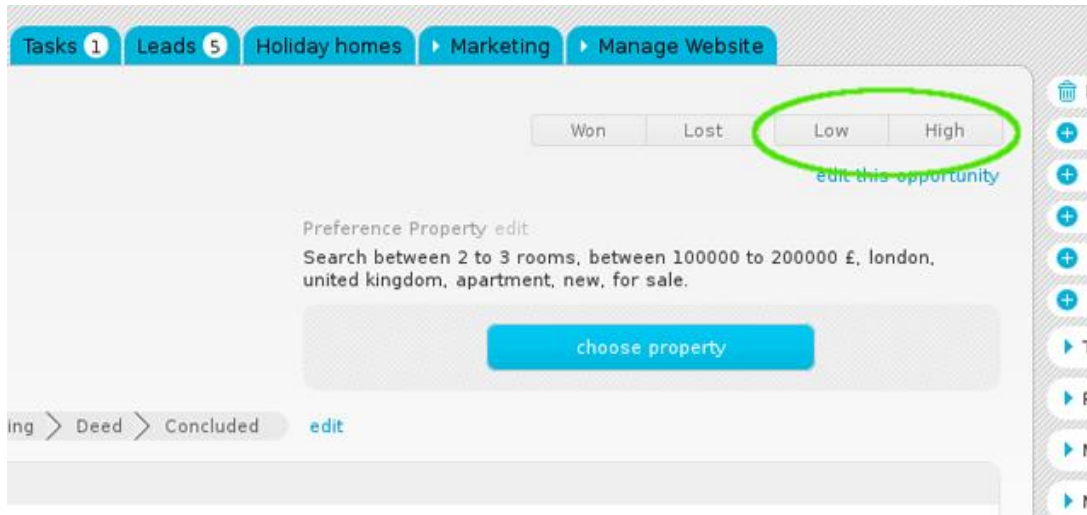
The screenshot shows a web interface with a 'Save opportunity' button highlighted by a green oval. Above the button, there are sections for 'Availability', 'Extra fields', and 'Who can see this opportunity'. The 'Who can see this opportunity' section has three radio button options: 'Everyone' (selected), 'Only me', and 'Me and plus...'. At the bottom of the page, there is a footer with the EGO Real Estate logo and navigation links.

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

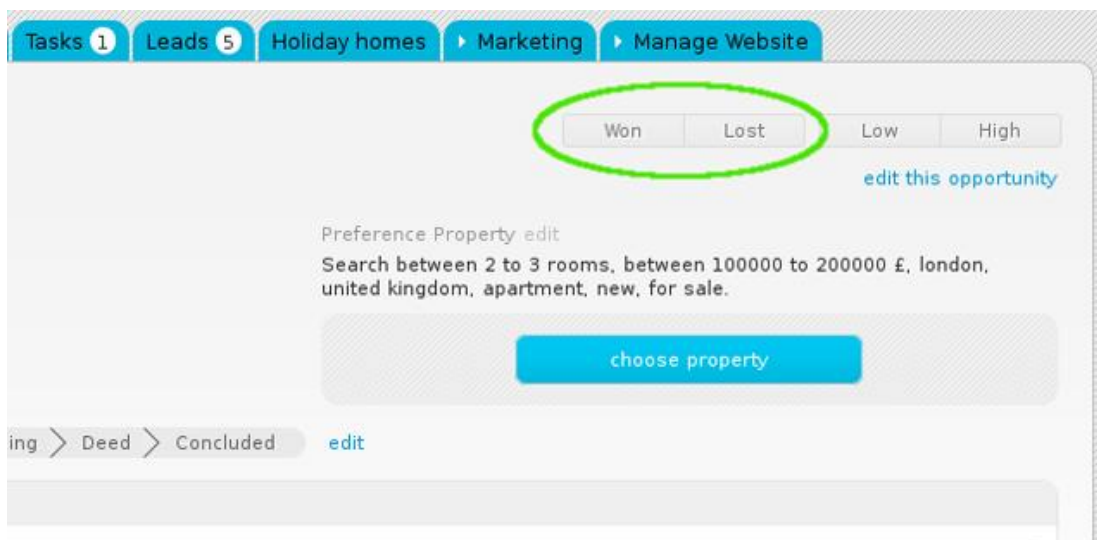
- Add notes, documents, visits or tasks;
- View associated contacts or visits to the property;
- Add proposals from potential customers;
- Associate or discard properties to the opportunity;
- 'Choose' a property that has a higher probability of closing the deal;
- Create roadmaps, etc.

The screenshot shows the 'Opportunities' page in a web interface. The page has a navigation bar with tabs for 'Properties', 'Contacts', 'Tasks 1', 'Leads 5', 'Holiday homes', 'Marketing', and 'Manage Website'. The main content area shows an opportunity titled 'Sale, VEN_1' with a status of 'Won' and a date of '15 January 2013'. The potential client is 'teste'. There is a 'Preference Property' section with a search criteria: 'Search between 2 to 3 rooms, between 100000 to 200000 £, in united kingdom, apartment, new, for sale.' A 'choose property' button is visible. Below the main content, there is a breadcrumb trail: 'Contact > Visits > Deciding > Financing > Deed > Concluded'. A green oval highlights the 'Adding note about' button. At the bottom, there is an 'Attach files' button and a counter showing '1 7'.

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>

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