How to manage origins and sub origins of opportunities

The application manager has the possibility to define the origin and sub origin of an opportunity and therefore find the source of leads/opportunities.

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This option allows the user to know which marketing channels are most used and/or what advertising options have the most impact on the company's image and therefore generate more leads.

After defining the origin of the opportunity, the user can also define the sub origin. Example: Origin –> Brochure / Sub origin –>August Brochure.
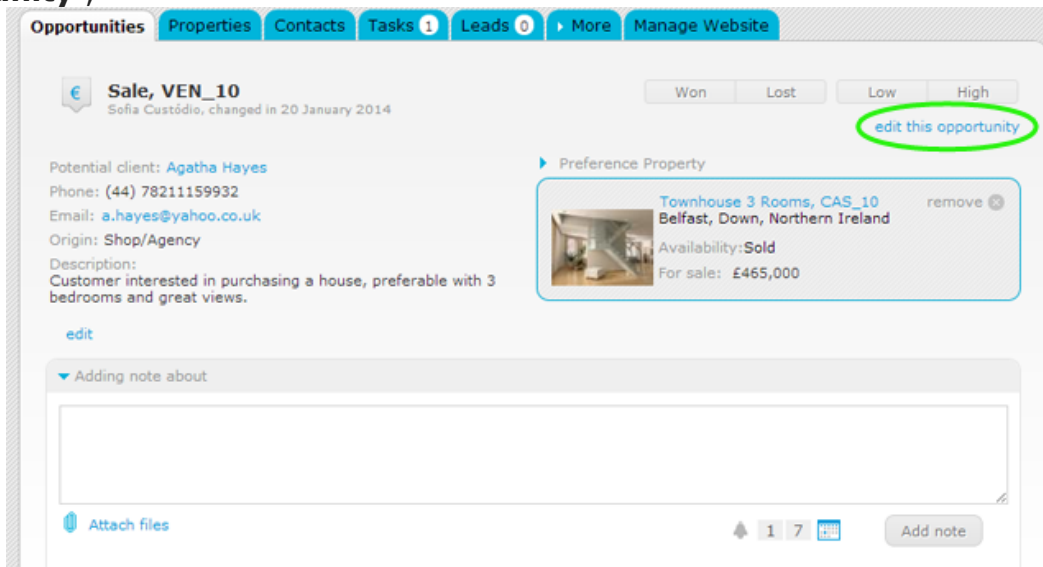
To define the origin and sub origin of opportunities, you should take the following steps:
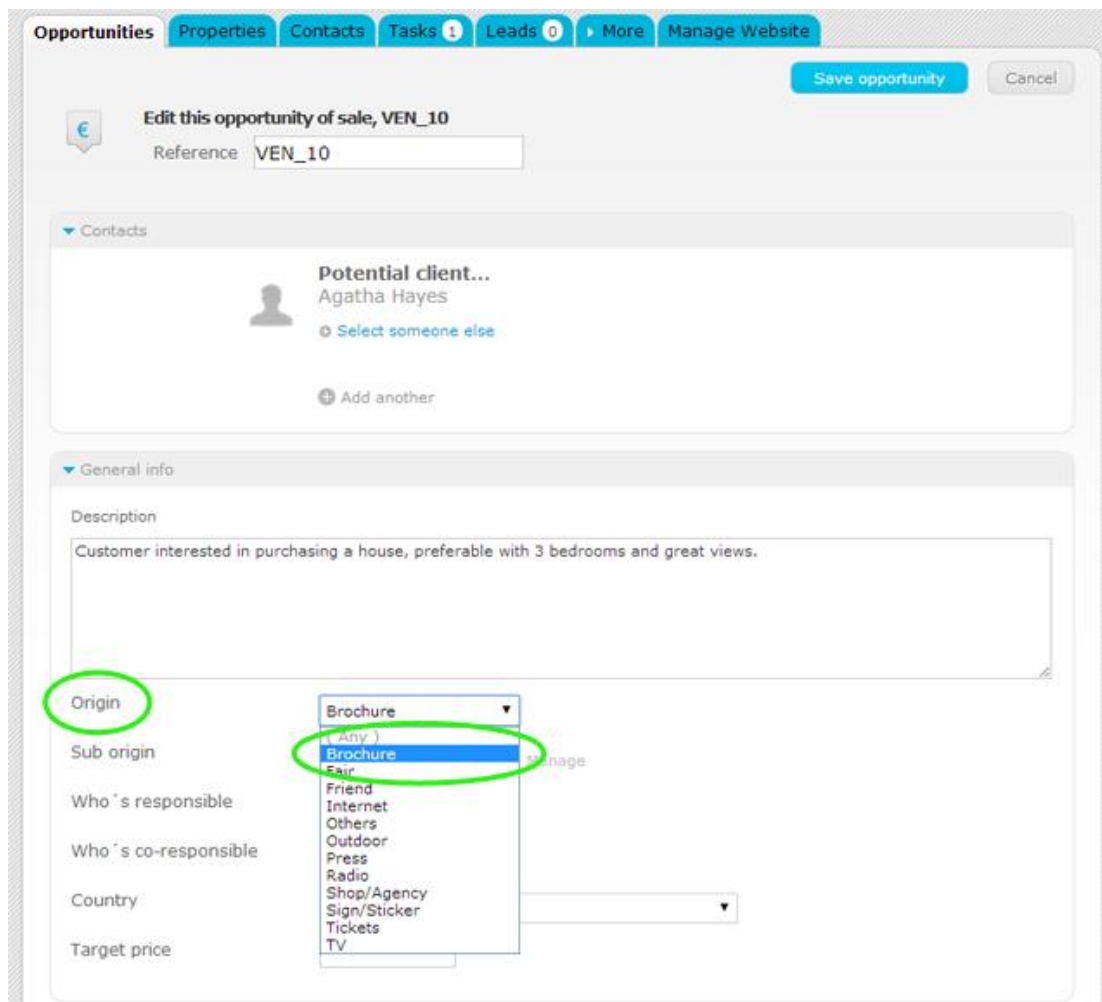
1. Access the **'Opportunities'** tab;

2. Select the opportunity to access the opportunity record and click '**Edit this opportunity**';

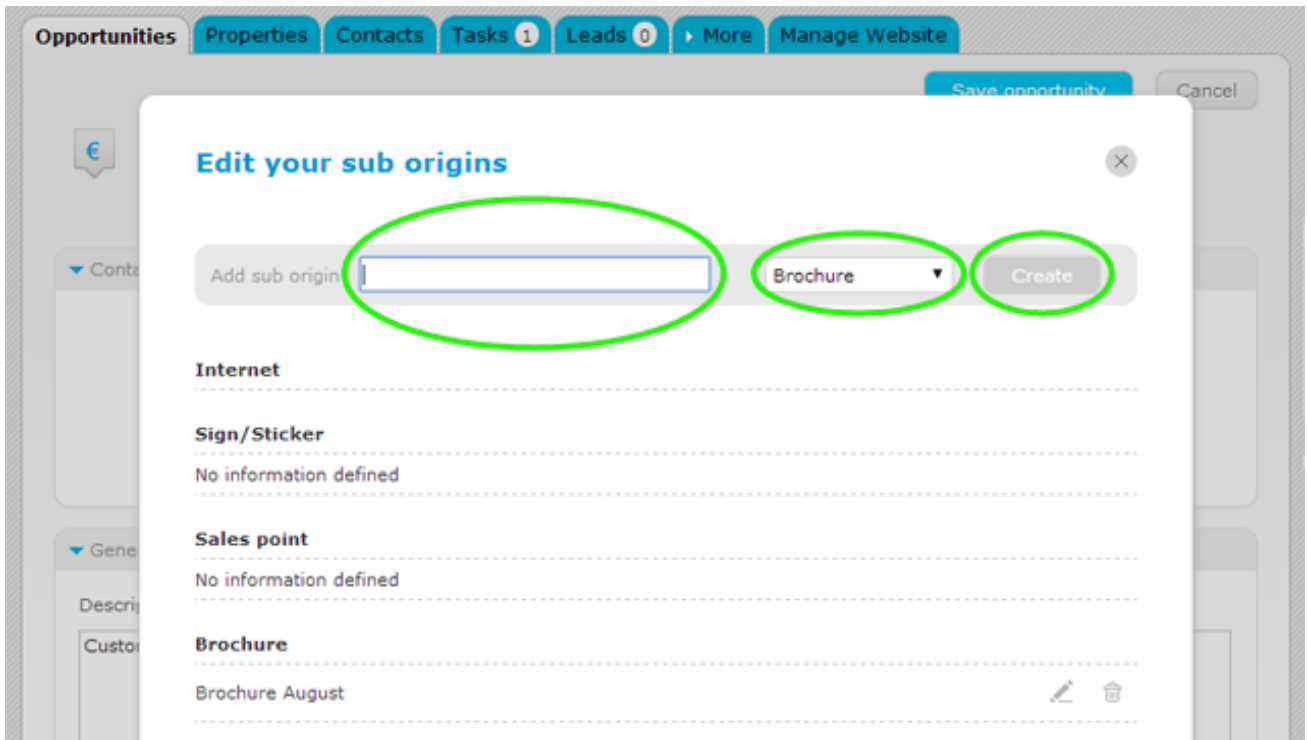**3.** In the opportunity record, select the desired origin. For example: Origin -> Brochure;

4. After selecting the origin, the user can also define the sub origin. To do this, simply select one of the available options or create a new sub origin.

5. To create a new sub origin, click '**Manage**';

6. Select the origin where you want to create a new sub origin and click '**Create**';

7. At the end, click **'Complete'**.

Note: Here you can also edit and/or delete the created sub origins;
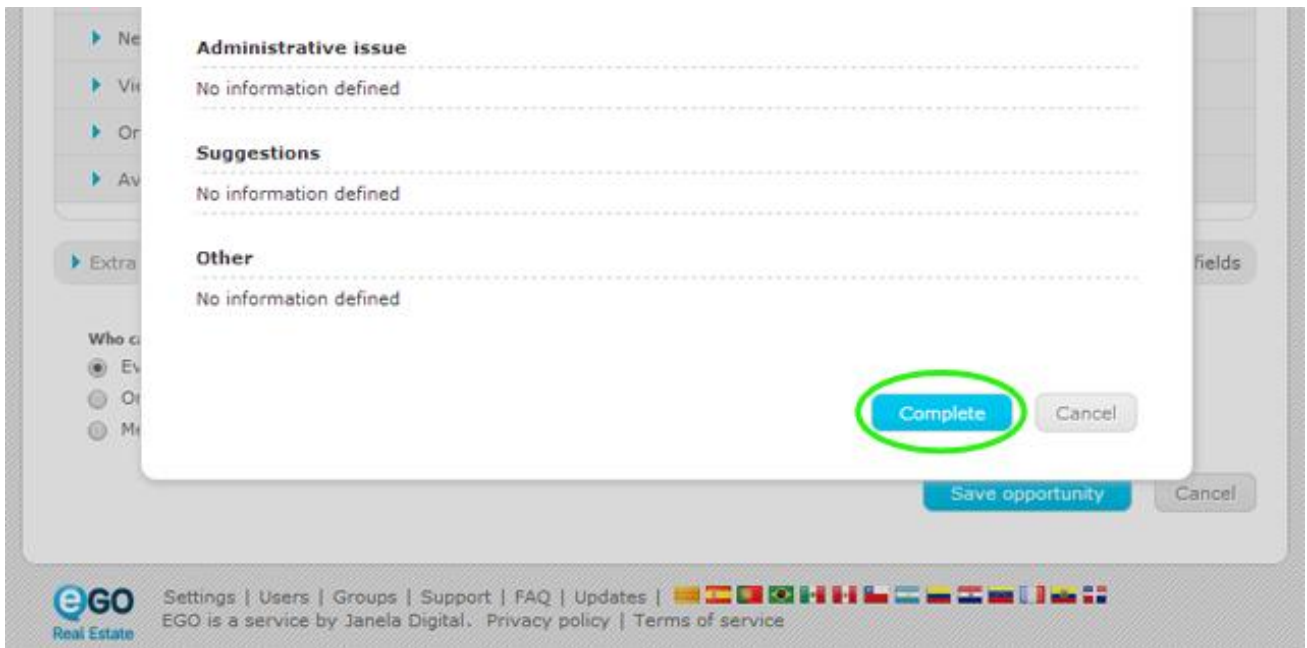
8. After the sub-origin has been created, you are redirected to the Opportunity record. Simply select the sub origin created, then click '**Save opportunity**';

9. The selected data will appear in the opportunity record;

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