

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.

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.

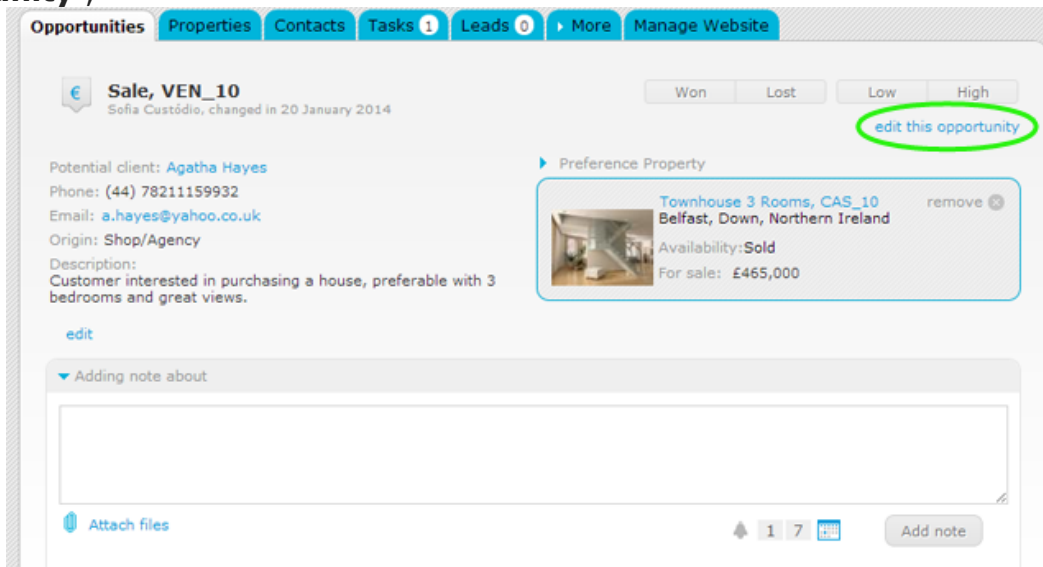
To define the origin and sub origin of opportunities, you should take the following steps:

1. Access the 'Opportunities' tab;

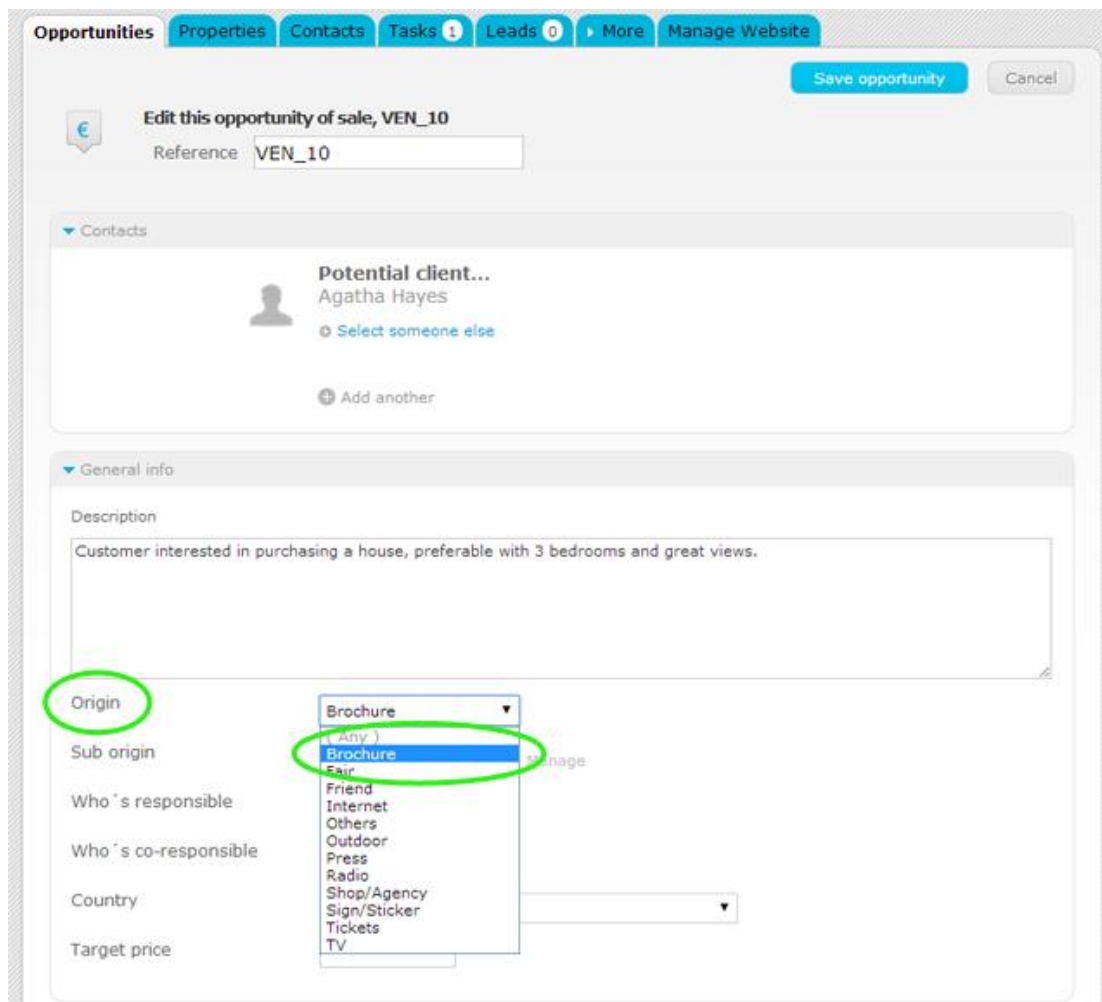
The screenshot shows the 'Opportunities' tab selected in the navigation menu. The main content area displays a search bar for finding opportunities, a filter dropdown set to 'Recently updated (Active)', and a list of opportunities. The first opportunity is 'Sale, VEN_10' with details for a potential client, Agatha Hayes, and a preference property, 'Townhouse 3 Rooms, CAS_10'.

Opportunity ID	Client Name	Client Contact	Property Name	Property Location	Property Status	Property Price
VEN_10	Agatha Hayes	(44) 78211159932 a.hayes@yahoo.co.uk	Townhouse 3 Rooms, CAS_10	Belfast, Down, Northern Ireland	Sold	£465,000

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;



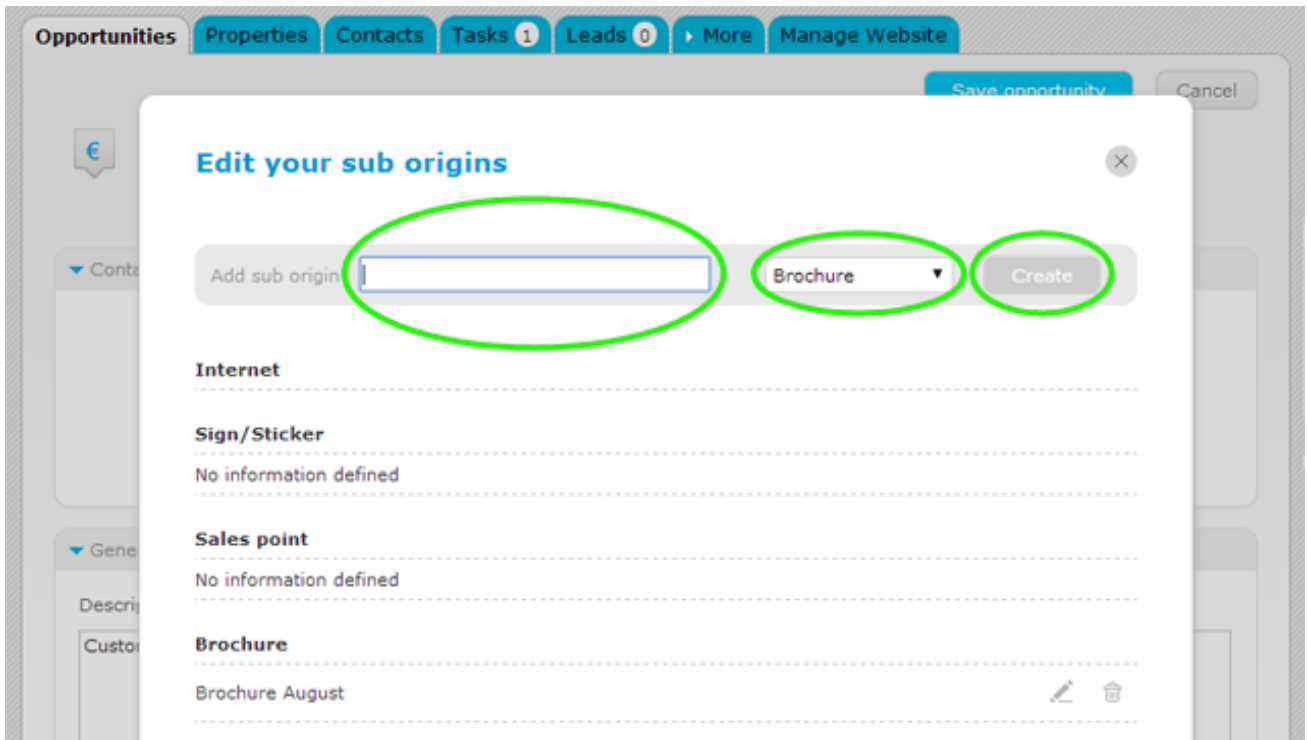
4. After selecting the origin, the user can also define the sub origin. To do this, simply select one of the available options or create a new sub origin.

The screenshot shows the 'Edit this opportunity of sale, VEN_10' form. The 'Origin' is set to 'Brochure'. The 'Sub origin' dropdown menu is open, showing options: 'Brochure August', '(Sub origin)', and 'New brochure'. The 'Sub origin' label and the dropdown menu are circled in green. Other fields include 'Who's responsible' (set to 'Brochure August'), 'Who's co-responsible' (set to '(All users)'), 'Country' (set to '(Country)'), and 'Target price' (empty).

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

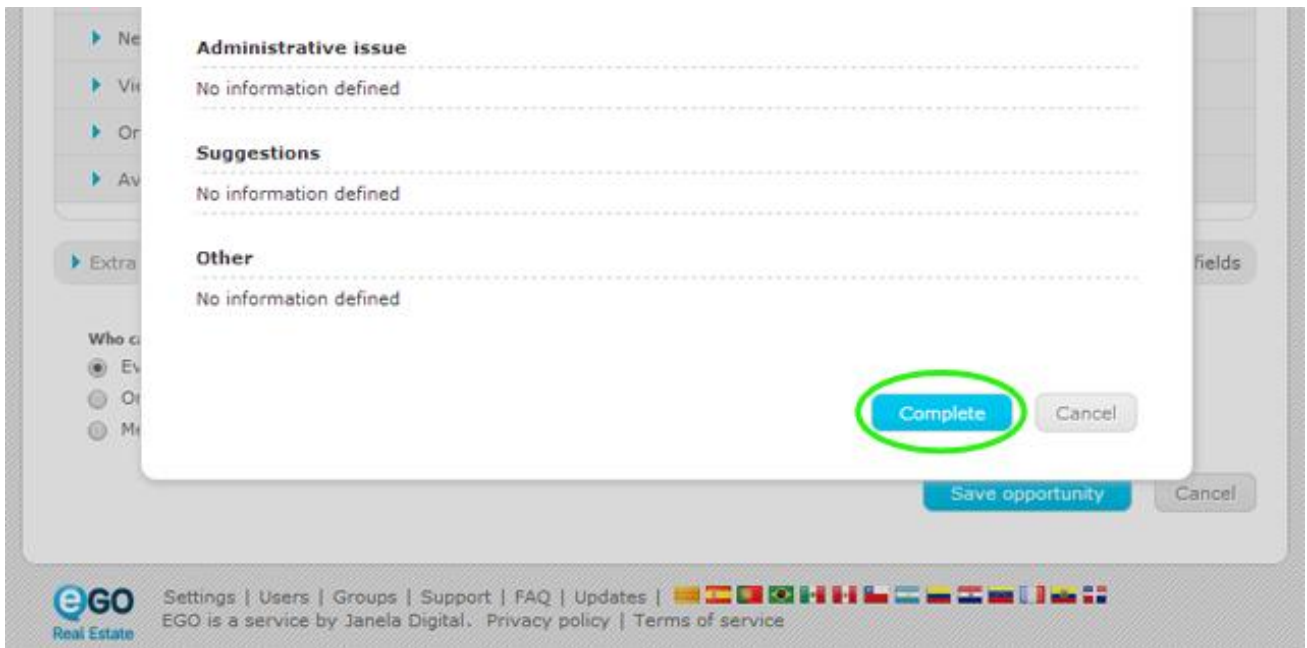
The screenshot shows the 'Edit this opportunity of sale, VEN_10' form. The 'Sub origin' dropdown menu is open, showing options: 'Brochure August', '(Sub origin)', and 'New brochure'. The 'Manage' link next to the dropdown menu is circled in green. Other fields include 'Who's responsible' (set to 'Sofia Custódio'), 'Who's co-responsible' (set to '(All users)'), 'Country' (set to '(Country)'), and 'Target price' (empty).

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'**;

The screenshot shows a form for creating an opportunity. The 'Origin' dropdown is set to 'Brochure'. The 'Sub origin' dropdown is selected and circled in green. Below it, 'Who's responsible' is 'Sofia Custódio', 'Who's co-responsible' is '(All users)', and 'Country' is '(Country)'. There is a 'Target price' input field. A 'Preference' section is expanded, showing options like 'Locations', 'Price, Number of Bedrooms and Area', 'Property type', 'Status', 'Business deal', 'Near', 'View to', 'Only with', and 'Availability'. There is also an 'Extra fields' section with a 'manage extra fields' link. At the bottom, there are radio buttons for 'Who can see this opportunity' with options 'Everyone', 'Only me', and 'Me and plus...'. The 'Save opportunity' button is circled in green.

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

The screenshot shows the 'Opportunities' record page for 'Sale, VEN_10'. The 'Potential client' is 'Agatha Hayes'. The 'Origin' is 'Brochure' and 'Sub origin' is 'Brochure August', both circled in green. The 'Description' says 'Customer interested in purchasing a house, preferable with 3 bedrooms and great views.' The 'Preference Property' section shows a property listing for 'Townhouse 3 Rooms, CAS_10' in 'Belfast, Down, Northern Ireland' with an availability of 'Sold' and a price of '£465,000'. There is a note section with 'Adding note about' and 'Attach files' options. The page also has tabs for 'Properties', 'Contacts', 'Tasks', 'Leads', and 'Manage Website'.

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

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