

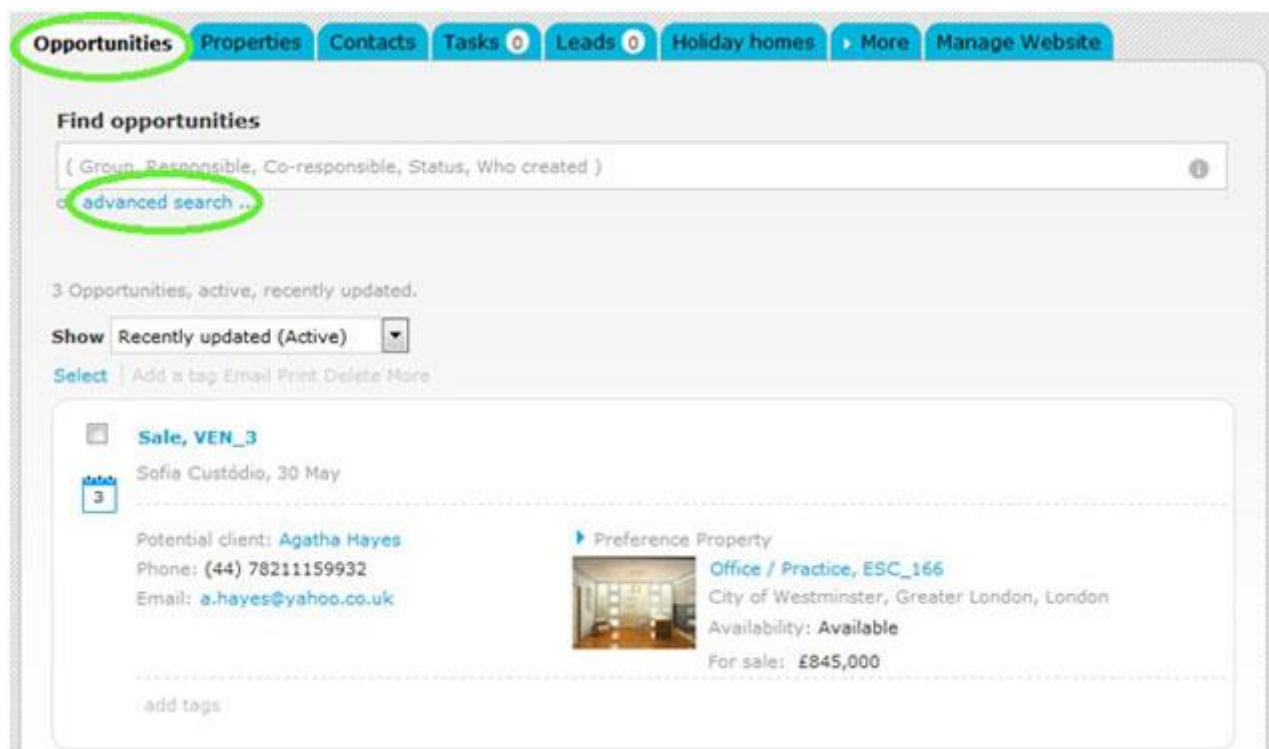
## How to recover a deleted Opportunity or Lead?

The eGO user can recover information about deleted Opportunities or Leads.

To do so, take the following steps:

### How to recover an Opportunity?

1. Go to '**Opportunities**' tab and click '**Advanced search**';



The screenshot displays the eGO Academy software interface. At the top, there is a navigation bar with several tabs: 'Opportunities', 'Properties', 'Contacts', 'Tasks', 'Leads', 'Holiday homes', 'More', and 'Manage Website'. The 'Opportunities' tab is highlighted with a green circle. Below the navigation bar, there is a search section titled 'Find opportunities'. A search input field contains the text '( Group, Responsible, Co-responsible, Status, Who created )'. Below the input field, there is a button labeled 'advanced search ..' which is also circled in green. Below the search section, there is a summary of results: '3 Opportunities, active, recently updated.'. A 'Show' dropdown menu is set to 'Recently updated (Active)'. Below this, there are several action links: 'Select', 'Add a tag', 'Email', 'Print', 'Delete', and 'More'. The main content area displays a list of opportunities. The first entry is 'Sale, VEN\_3' with a checkbox. Below it, there is a date 'Sofia Custódio, 30 May' and a small calendar icon. To the right, there is a 'Preference Property' section with a small image of an office and the text 'Office / Practice, ESC\_166', 'City of Westminster, Greater London, London', 'Availability: Available', and 'For sale: £845,000'. At the bottom of the entry, there is a link 'add tags:'.

2. Inside the 'Advanced search' menu, on the 'Stage' dropdown menu, select 'Deleted' and click 'Search opportunities'.

The screenshot shows the 'Opportunities advanced search' interface. At the top, there are navigation tabs: Opportunities, Properties, Contacts, Tasks (0), Leads (0), Holiday homes, More, and Manage Website. Below this is the 'Opportunities advanced search' section. It features a grid of search filters. The 'Stage' filter dropdown is open, showing options: ( Stage ), Active, Won, Lost, Deleted (highlighted), and Promoted. Below the filters are three search scope buttons: Search in associated properties, Search in associated contacts, and Search in associated preferences. At the bottom right, there is a 'Search opportunities' button (highlighted) and a 'back to reference search' button. At the bottom left, it says '3 Opportunities, active, recently updated.'

3. All deleted opportunities will be shown.

To recover an opportunity, open it;

**Opportunities** Properties Contacts Tasks 0 Leads 0 Holiday homes More Manage Website

### Opportunities advanced search

Reference	( Person responsible / Co-re	( Type )	Deleted
( Created by )	( Origin )	( Depends on the origin )	( Portal )
( Created in )	( Date modified )	( Country )	( Office )
( State of the proposal )	( Proposal created since )	( Tags )	( Lead type )
( Probability )	( Visit forms since )	( With tasks )	( Timelines )
( Overdue tasks since )	( Stage changed by )	( Stage changed in )	( Properties )

Search in associated properties  
Search in associated contacts  
Search in associated preferences

Search opportunities back to reference search

2 Opportunities, active, deleted, recently updated.

Show Recently updated (Active)


Select Add a tag Email Print Delete More

**Holiday rental, LLO\_6**

João Verissimo, 23 Jul

Potential client: Sofia Custódio  
Phone:  
Email:

Search start date 18/07/2014, end date 29/07/2014.

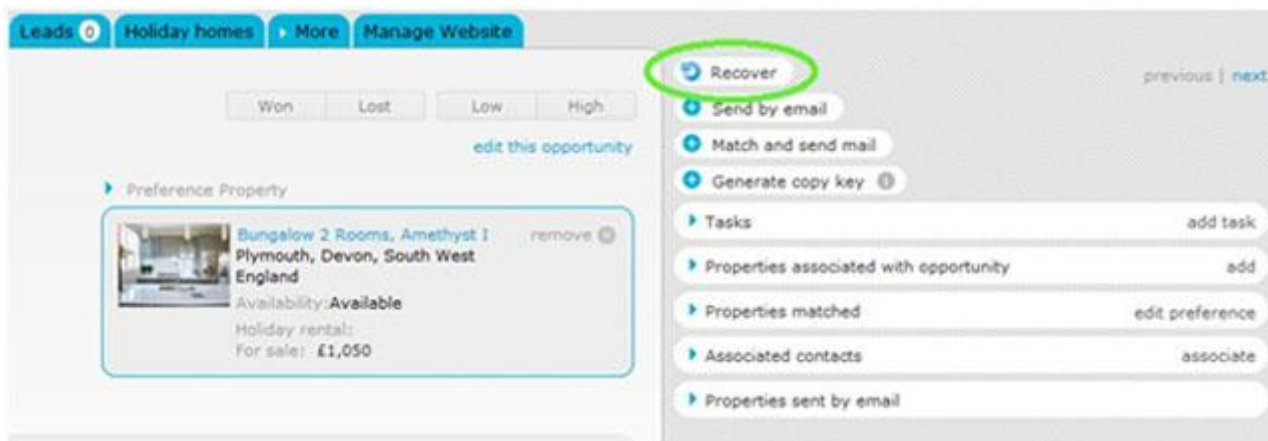
 Bungalow 2 Rooms, Amethyst I  
Plymouth, Devon, South West England

July 2014							August 2014						
M	T	W	T	F	S	S	M	T	W	T	F	S	S
30	1	2	3	4	5	6	28	29	30	31	1	2	3
7	8	9	10	11	12	13	4	5	6	7	8	9	10
14	15	16	17	18	19	20	11	12	13	14	15	16	17
21	22	23	24	25	26	27	18	19	20	21	22	23	24
28	29	30	31	1	2	3	25	26	27	28	29	30	31
4	5	6	7	8	9	10	1	2	3	4	5	6	7

add tags

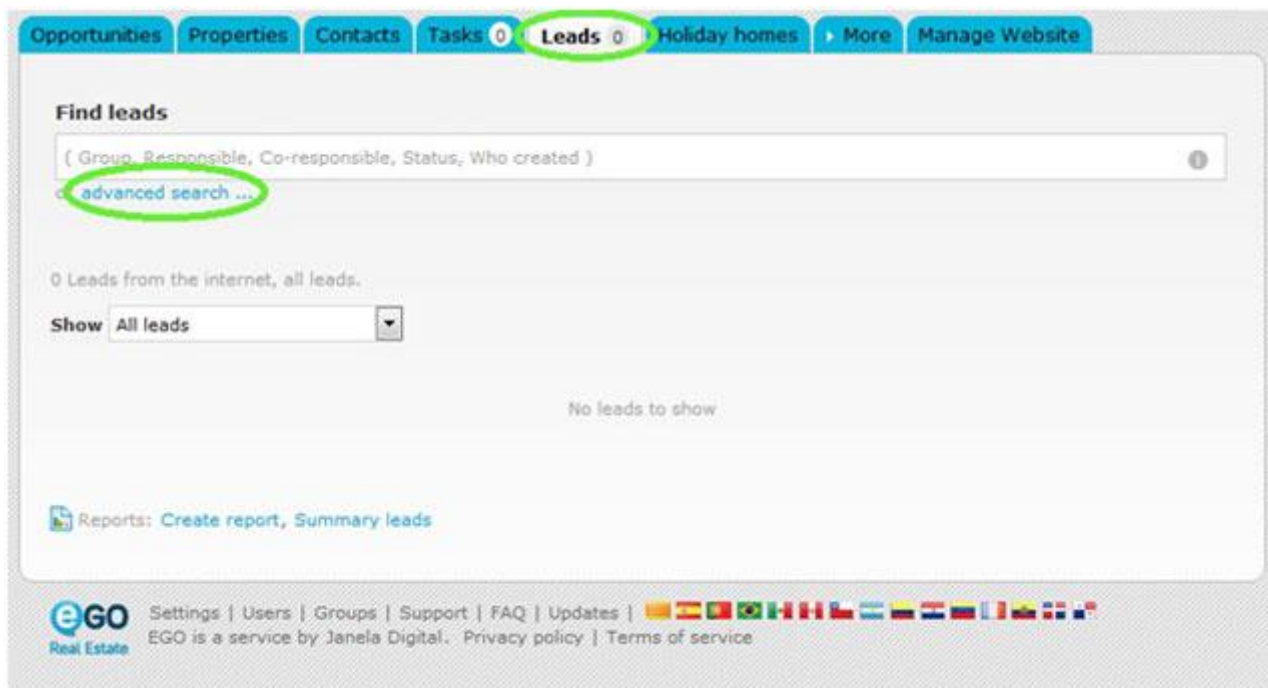
4. Within the opportunity register click '**Recover**'.

After this, the opportunity will be recovered.

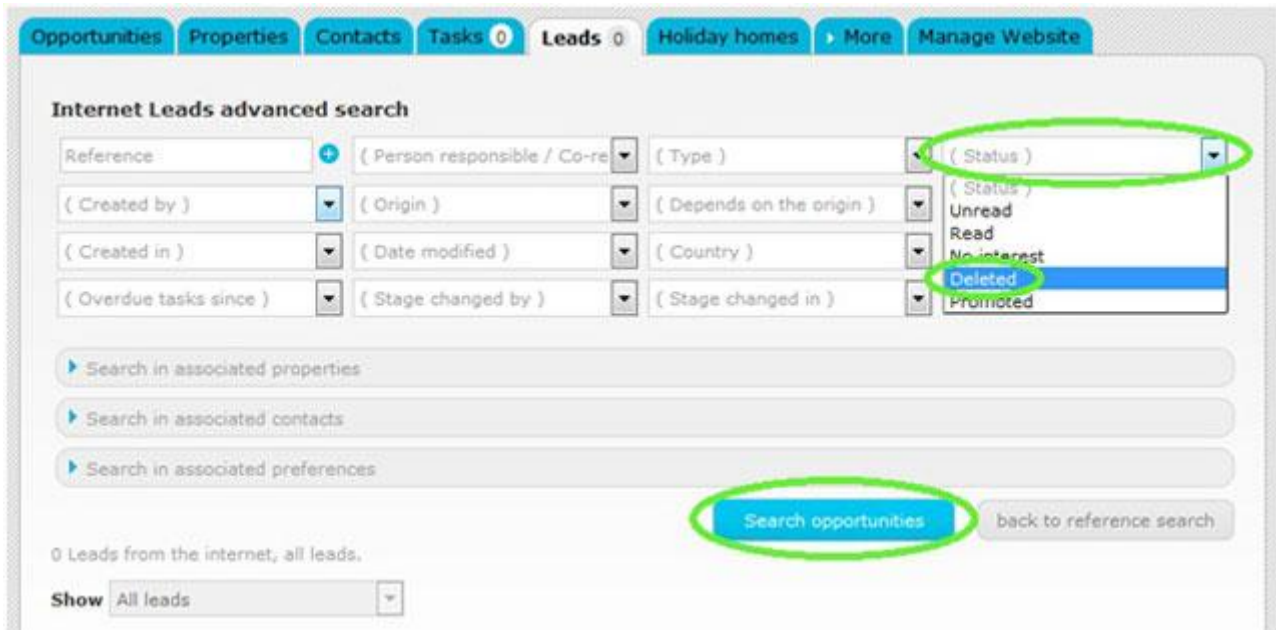


## How to recover a Lead?

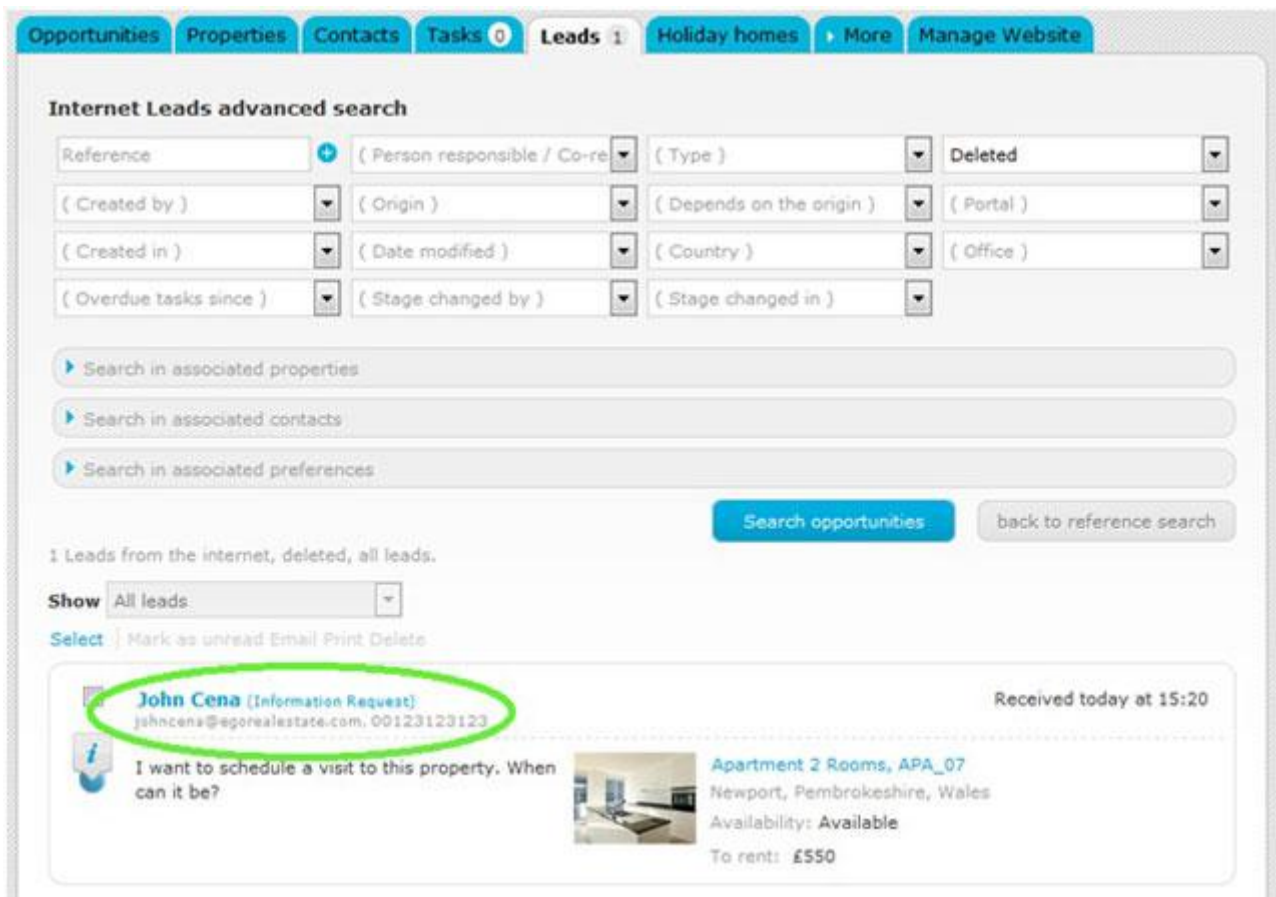
1. Go to '**Leads** tab and click '**Advanced search**';



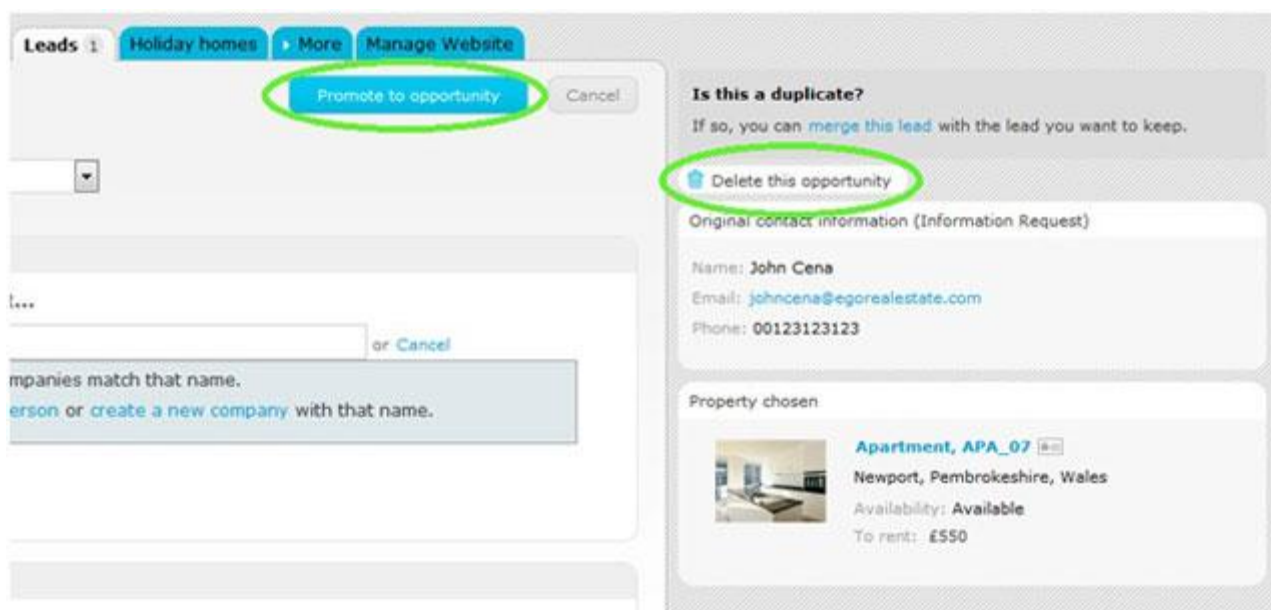
2. Inside the 'Advanced search' menu, on the 'Stage' dropdown menu, select 'Deleted' and click 'Search Leads';



3. All deleted Leads will be shown.  
To recover a Lead, open it;



4. Within the Lead register, you can promote it again to '**Opportunity**' or definitely delete it.



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**Questions:** [support@egorealestate.com](mailto:support@egorealestate.com)