eGO Academy



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 'Oportunities' tab and click 'Advanced search';

(Grou	n Responsible, Co-res	ponsible, S	tatus, Who cri	eated)				0
adva	inced search							
Opport	tunities, active, recent	y updated.						
Show F	Recently updated (Activ	re) 💌						
Select	Add a tag Email Print	Delete Man						
83	Sale, VEN_3							
3	Sofia Custódio, 30 M	iγ.						
	Potential client: Agat	ha Hayes		▶ Prefere	nce Property			
	Phone: (44) 7821115	9932		N	Office / Prad	tice, ESC_1	66	
	Email: a.hayes@yah	o.co.uk			City of West	ninster, Gre	sater London, London	
					Availability:	Available		
					For sale: £8	45,000		
	Constant and some of							

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

Reference	0	(Person responsible / Co-re	(Type)	-	(Stage)
(Created by)	•	(Origin)	(Depends on the origin)	•	(Stage) Active
(Created in)		(Date modified)	(Country)	•	Won Lott
(State of the proposal)	•	(Proposal created since)	(Tags)		Promoted
(Probability)	•	(Visit forms since)	(With tasks)	•	(Timelines)
(Overdue tasks since)	٠	(Stage changed by)	(Stage changed in)	٠	(Properties)
 Search in associated pro Search in associated control 	operti	65			
 Search in associated col 	ntacts				

3. All deleted opportunities will be shown.

To recover an opportunity, open it;

pportunities advanc				() · · · ·					particular and a second					
leference	0	(Person responsible / Co	0-re 💌	(1	Type)					Delete	d			
(Created by)	•	(Origin)	-	(1	Depend	ds on t	the or	iġin)	•	(Porta	0			
(Created in)	•	(Date modified)	•	(Countr	γ)			•	Office	:)			
(State of the proposal)	•	(Proposal created since) 💌	10	Tags)				•	Lead	type)		
(Probability)	•	(Visit forms since)		0	With ta	sks)			•	Time	lines))		
Overdue tasks since)	-	(Stage changed by)	-	(:	Stage o	change	ed in))	•	(Prope	erties)		
Search in associated pr Opportunities, active, dele	eferen eted, r	ecently updated.				Searc	sh opp	portuniție		bi	nck to	refe	renc	e sea
Search in associated pr Opportunities, active, dele now Recently updated (A elect Add a tag Email Pr Holiday rental, João Verissimo, 2	eted, r Active) ant De LLO_e S Jul	ecently updated.				Searc	ch op;	portunitie	8	bi	ack to	refe	renc	e sea
Search in associated pr Opportunities, active, dele now Recently updated (A alect Add a tag Email Pr Holiday rental, João Verissimo, 2 Potential client: Se	eted, r Active) Ant De LLO_C S Jul	ecently updated.			July	Searc	h op;	portunitie		bi	ack to	: refe	renc 4	e sea
Search in associated pr Opportunities, active, dele now Recently updated (A elect Add a tap Email Pr Holiday rental, João Vensumo, 2 Potential client: Se Phone:	eted, r Active) not De S Jul ofia Cu	ecently updated.	м	T	July :	Searc 2014	h op:	sortunitie	5	ai T	ack to	refe 2011 F	renc 4	e sea
Search in associated pr Opportunities, active, dele now Recently updated (A elect Add a tag Email Pr Holiday rental, João Verissimo, 2 Potential client: Se Phone: Email: Search start data	eferen eted, r active) nnt De LLO_C 5 Jul ofia Cu	ecently updated.	M 30	T 1	July : W T	Searc 2014 7 F 3 4	ch opp S	s S	M 28	ры Ал Т 29 3	ack to agust W T 30 31	: 2011 F	4 S 2	e sea S 3
Search in associated pr Opportunities, active, dele now Recently updated (A elect Add a tag Email Pr Add a tag Email Pr Boliday rental, João Venssimo, 2 Potential client: Se Phone: Email: Search start date 29/07/2014.	eted, r Active) ant De LLO_6 S Jul ofia Cu 18/07,	ecently updated.	M 30 7	T 1 8	July : W T 2 3 9 10	22014 F 3 4 0 11	ch op; 5 5 12	s 5 6 13	55 M 28 4	ь Ан Т 29 3 5	ack to agust W T 10 31 6 7	2011 F 8	4 S 2 9	e sea S 3 10
Search in associated pr Opportunities, active, dele now Recently updated (A elect Add a tap Email Pr Holiday rental, João Verissimo, 2 Potential client: S Phone: Email: Search start date 29/07/2014.	eferen eted, r active) ant De S Jul ofia Cu 18/07, 2 Rool	ecently updated.	M 30 7 14	T 1 8 15	July : W T 2 3 9 10 16 13	2014 F F 3 4 0 11 7 18	5 5 12	S 6 13 20	M 28 4 11	ь Ан Т 29 3 5 12 1	ack to agust W T 6 7 3 14	: 2011 F 1 8 4 15	44 5 2 9 5 16	e sea S 3 10
Search in associated pr Opportunities, active, dele now Recently updated (A elect Add a tag Email Pr Holiday rental, João Verissimo, 2 Potential client: Se Phone: Email: Search start date 29/07/2014. Bungalow Plymouth,	eted, r Active) ant De S Jul ofia Co 18/07, 2 Roor Devor	ecently updated.	M 30 7 14 21	T 1 8 15 22	July : W T 2 3 9 10 16 17 23 20	2014 F F 3 4 0 11 7 18 4 25	5 5 12 19 26	S 6 13 20 27	M 28 4 111 18	Au 7 1 29 3 5 12 1 19 2	agust W T 6 7 33 14 10 21	201 F 1 8 4 15 1 22	4 5 16 23	s 3 10 17 24

4. Within the opportunity register click 'Recover'.

After this, the opportunity will be recovered.

previous (nex	Recover	
	Send by email	Won Lost Low High
	 Match and send mail 	edit this opportunity
	O Generate copy key ()	Preference Property
add task	▶ Tasks	Sum and Bungalow 2 Rooms, Amethyst I remove O
add task add	Tasks Properties associated with opportunity	Bungalow 2 Rooms, Amethyst I remove C Plymouth, Devon, South West England
add task add edit preference	Tasks Properties associated with opportunity Properties matched	Bungalow 2 Rooms, Amethyst I remove () Plymouth, Devon, South West England Availability:Available
add task add edit preference associate	Tasks Properties associated with opportunity Properties matched Associated contacts	Bungalow 2 Rooms, Amethyst I remove O Plymouth, Devon, South West England Availability:Available Holiday rental: For sale: £1,050

How to recover a Lead?

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

advanced s	search	esponsible, Stat	us, Who create	sd)			0
Leads from t	he internet, al	leads.					
how All lead	is						
				No leads to	show		
Reports: O	reate report, S	iummary leads					

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

Reference	0	(Person responsible / Co-re	•	(Type)	2	(Status)
(Created by)	-	(Origin)	•	(Depends on the origin)	-	(Status) Unread
(Created in)	•	(Date modified)	•	(Country)	•	Read No interest
(Overdue tasks since)	-	(Stage changed by)	-	(Stage changed in)	F	Promoted
 Search in associated pr Search in associated co 	opertie ntacts	6				
Cancel in according of	eteren	nes				

3. All deleted Leads will be shown.

To recover a Lead, open it;

Reference	0	(Person responsible / Co-re		(Type)	٠	Deleted
(Created by)	•	(Origin)	•	(Depends on the origin)	•	(Portal)
(Created in)	•	(Date modified)	•	(Country)	-	(Office)
(Overdue tasks since)	•	(Stage changed by)	•	(Stage changed in)	•	
I Leads from the internet, d	eleted,	all leads.				
Section Distances on		-				
Show All leads						
Show All leads Select Mark as units ad Em	hil Brin	t Delete				
Show All leads Select Mark as unitsed Err Dohn Cena (Infor	hil Prin	(equest)				Received today at 15:20
Show All leads Select Mark as unread Err John Cena (Infor Jahncens@egoreales i	ail Prin nation R tate-con	it Delete Request) n. 00123123123		Anartment 2 Rooms	APA	Received today at 15:20

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

Leads 1 Holiday homes More Manage Website Promote to opportunity Cencel	Is this a duplicate? If so, you can merge this lead with the lead you want to keep.
•	Delete this opportunity
t or Cancel	Name: John Cena Email: johncena@egorealestate.com Phone: 00123123123
mpanies match that name. erson or create a new company with that name.	Property chosen Apartment, APA_07 Newport, Pembrokeshire, Wales Availability: Available To rent: £550

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

.....

Questions: <u>support@egorealestate.com</u>