

Activate the 'with recent properties' filter in the opportunities tab

eGO users can activate a filter to search for the opportunities **'with recent properties'** in the quick search filters of the opportunity tab. When this filter is activated, it allows you to check if the new (or recently changed) properties fit the existing opportunities.

When you create a new opportunity, eGO matches the preferences with the properties available in the database, but this matching only happens with the properties that you already have in your database by the time you create the opportunity. If you want to know which new properties fit the active opportunities, you should activate the **'with recent properties'** filter.

To activate this filter, please take the following steps:

1. Go to the **'Opportunities'** tab and click **'edit'** in the **'quick search'**;

The screenshot shows the eGO Academy interface with the 'Opportunities' tab selected. The 'Quick search' dropdown menu is open, and the 'edit' button next to it is highlighted in green. The main content area shows a list of opportunities, with the first one being 'Sale, VEN_211' by Marta Neves, dated 11 Jun. The interface includes navigation tabs at the top, a search bar, and a list of opportunities with details for each.

2. In the search filters settings check the option **'with recent properties'**

Set search filters

Changes to the search filters affect only the current user's filters, or in other words to change a search filter, you are only changing the selection of filters from your personal account.

Type

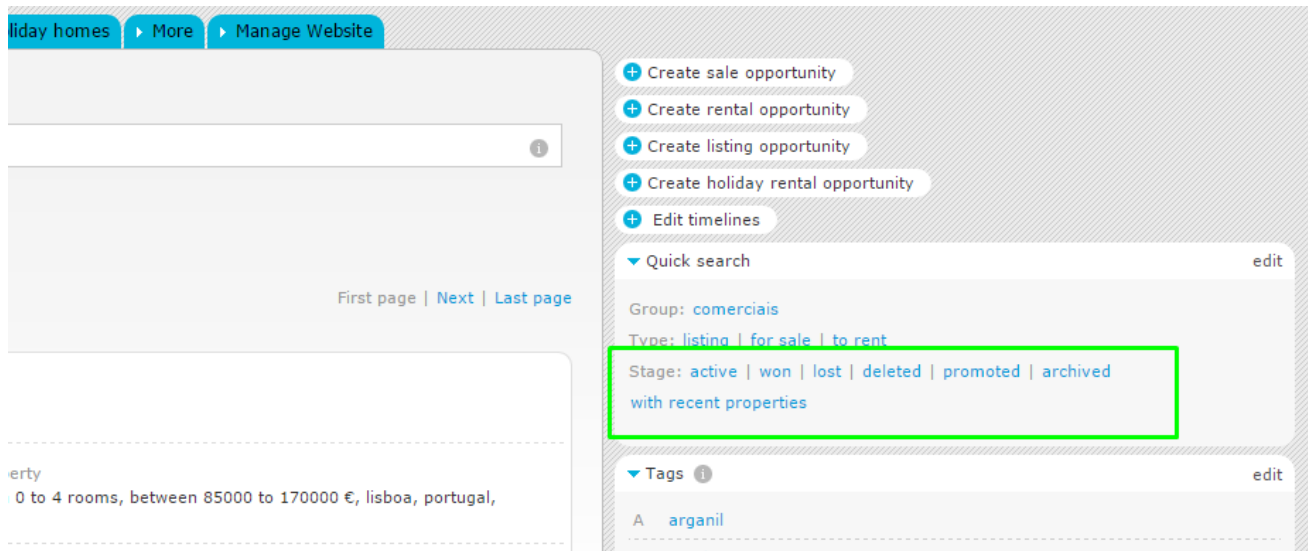
- Listing
- For sale
- To rent
- Holidays rental

Stage

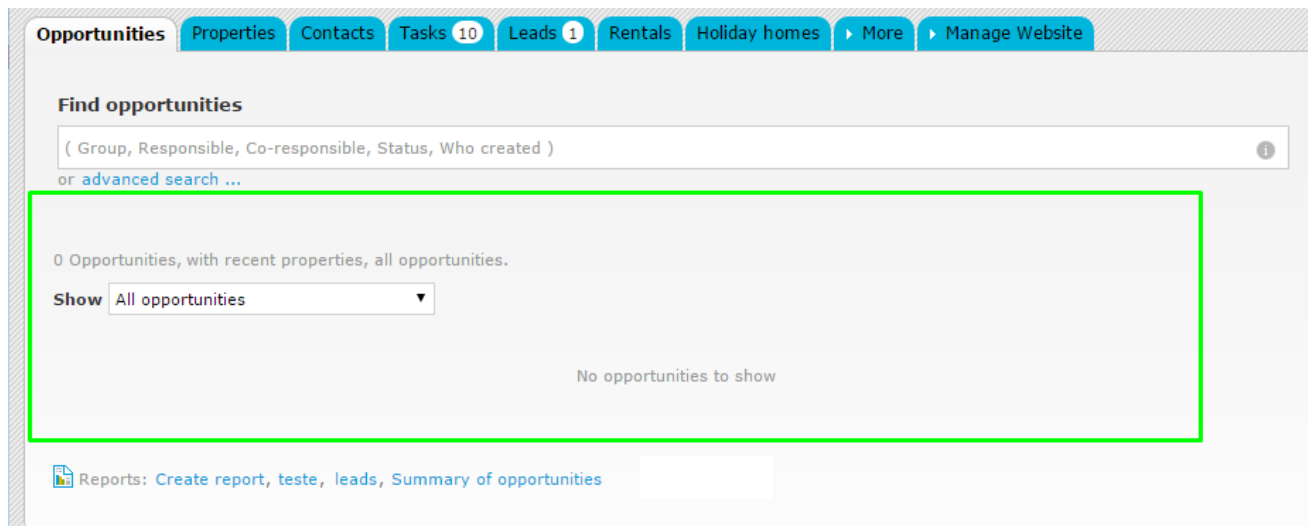
- Active
- Won
- Lost
- Deleted
- Promoted
- Archived

With recent properties

NOTE: After activating this filter, you'll see it in the quick search menu, next to the **'Stage'** filters (active | won | lost | deleted | promoted | archived).



3. After activating the filter, if you select it, you won't be shown any result. It will only give you results 24h after being activated;



NOTE: After enabling this filter for the first time, it will take 24h for eGO to match the new properties, or recently changed properties, with the opportunities (**this is not the traditional match between properties and opportunities**). This matching is always performed, even when the **'with recent properties'** option is not activated. The difference is that it will be possible to search for the opportunities that have the 🏠 symbol.

4. 24h after activating the **'with recent properties'** filter, you'll start having search results (in case a property matches the preferences set in the opportunities). Click the filter **'with recent properties'** and check if you have any result;

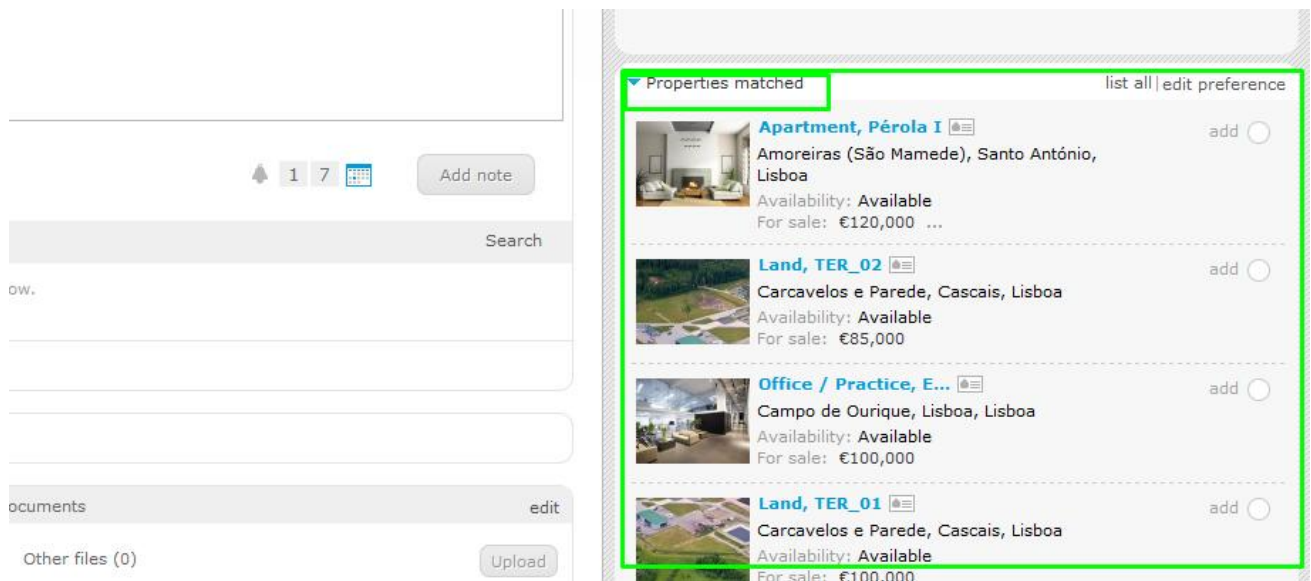
The screenshot shows the 'Find opportunities' section of a software interface. At the top, there is a search bar with the text '(Group, Responsible, Co-responsible, Status, Who created)' and a link to 'advanced search ...'. Below the search bar, it says '25 Opportunities, with recent properties, all opportunities.' There is a 'Show' dropdown menu set to 'All opportunities' and navigation links for 'First page', 'Next', and 'Last page'. A 'Select' button is followed by links for 'Add a tag', 'Email', 'Print', 'Delete', and 'More'. The main content area displays a list of opportunities. The first one is 'Sale, VEN_213' by 'Marta Neves, 11 Jun'. It includes a 'Preference Property' icon (a gold coin) and a search criteria: 'Search between 0 to 4 rooms, between 85000 to 180000 €, centro, marvila, lisboa, apartment, used or new, available.' To the right of the main content, there is a sidebar with several buttons: 'Create sale opportunity', 'Create rental opportunity', 'Create listing opportunity', 'Create holiday rental opportunity', and 'Edit timelines'. Below these is a 'Quick search' section with filters for 'Group: comerciais', 'Type: listing | for sale | to rent', and 'Stage: active | won | lost | dele'. A button labeled 'with recent properties' is highlighted with a green box. At the bottom of the sidebar, there is a 'Tags' section with 'A arganil' and 'V venda'.

NOTE: The opportunities with new properties available will appear with the following symbol 🏠.

5. Click one of the opportunities;

The screenshot shows the 'Opportunities' section of a software interface. At the top, there is a navigation bar with tabs for 'Opportunities', 'Properties', 'Contacts', 'Tasks' (with a count of 10), 'Leads' (with a count of 5), 'Rentals', 'Holiday homes', 'More', and 'Manage Website'. Below the navigation bar, there is a 'Find opportunities' section with a search bar containing '(Group, Responsible, Co-responsible, Status, Who created)' and a link to 'advanced search ...'. Below the search bar, it says '120 Opportunities, all opportunities.' There is a 'Show' dropdown menu set to 'All opportunities' and navigation links for 'First page', 'Next', and 'Last page'. A 'Select' button is followed by links for 'Add a tag', 'Email', 'Print', 'Delete', and 'More'. The main content area displays a list of opportunities. The first one is 'Sale, VEN_211' by 'Marta Neves, 11 Jun'. It includes a 'Preference Property' icon (a gold coin) and a search criteria: 'Search between 0 to 4 rooms, between 85000 to 170000 €, lisboa, portugal, available.' To the right of the main content, there is a sidebar with several buttons: 'Create sale opportunity', 'Create rental opportunity', 'Create listing opportunity', 'Create holiday rental opportunity', and 'Edit timelines'. Below these is a 'Quick search' section with filters for 'Group: comerciais', 'Type: listing | for sale | to rent', and 'Stage: active | won | lost | dele'. A button labeled 'with recent properties' is highlighted with a green box. At the bottom of the sidebar, there is a 'Tags' section with 'A arganil' and 'V venda'.

6. In the 'Properties matched' you will see the properties which were recently added (as well as the other properties which matched the opportunity before) and that match the selected opportunity. The property that triggers the alert will also have the symbol 🏠.



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

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