Step 7: How to manually create Opportunities

Opportunities are business possibilities that match a contact's preferences to one or more properties in your portfolio.

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All monitoring and necessary actions to close a deal are done in the 'Opportunities' tab. Opportunities can originate from two sources: manual insertion or internet leads.

To manually insert an opportunity, take the following steps:

1. Open the **"Opportunities"** tab and click "**New opportunity**";

2. Select one of the following options **"Sales Opportunity"** (opportunity to sell a property), **"Rental Opportunity"** (opportunity to rent a property), **"Listing Opportunity"** (opportunity to list a property) or **"Holiday Rental Opportunity"**;
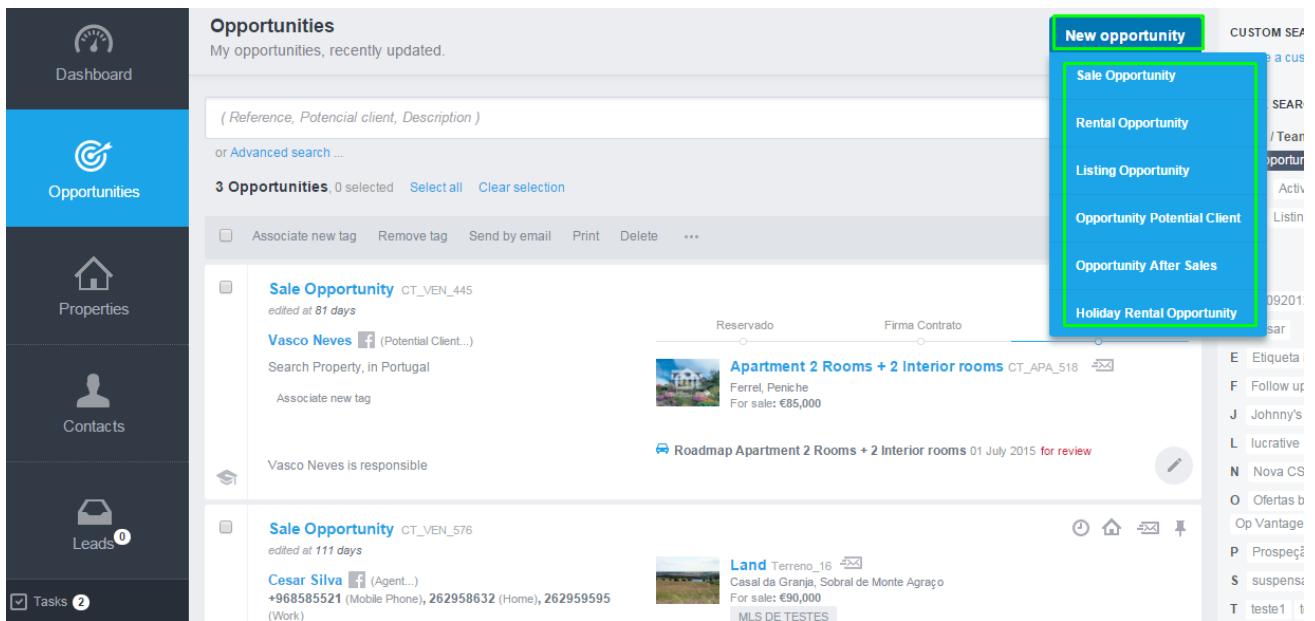
3. Depending on the type of opportunity, complete the form with all the necessary information . Start by filling in the information on **"Who looks for the property"**. Create or enter a contact as well as the origin/Sub origin;
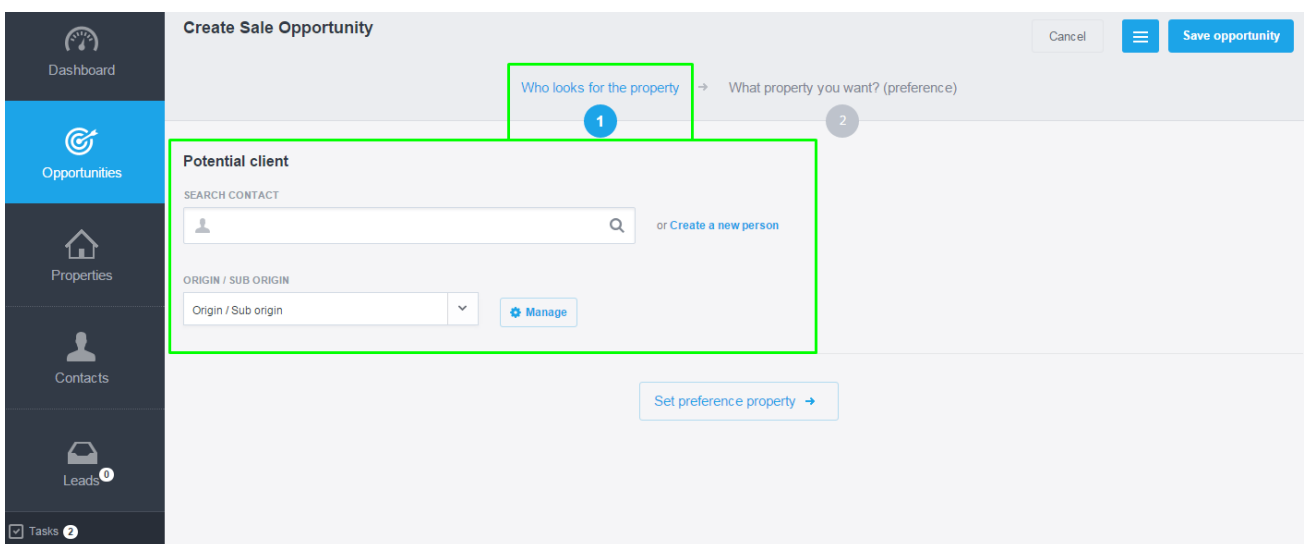
4. Afterwards, insert information about the property (preferences). Describe the opportunity; enter the property location, the typology, price and areas.

Near

- ☐ City Center
- ☐ School
- ☐ Hospital
- ☐ Police
- ☐ Public Transports
- ☐ Commercial Area

View to

- ☐ View to Countryside
- ☐ View to City
- ☐ View to Sea
- ☐ View to Mountain
- ☐ View to Beach
- ☐ View to River

Only with

- ☐ Disabled People Access
- ☐ Balconies
- ☐ Lift
- ☐ Outdoor Parking
- ☐ Indoor Parking
- ☐ Garage
- ☐ Garden
- ☐ Furniture
- ☐ Solar Orientation
- ☐ Security Service
- ☐ Terrace
- ☐ Storage Room
- ☐ Swimming Pool
- ☐ Energy Performance Certificate
- ☐ Photo
- ☐ Georeference

Other criteria

NUMBER OF FLOORS

Floors from ▾

Tags

- ☐ a1
- ☐ alfa
- ☐ Alvorninha
- ☐ Amiais
- ☐ amoreiras
- ☐ Bienes y Raices
- ☐ bla teste hr
- ☐ Black Citadel
- ☐ casa de lujo
- ☐ Casa de Luxo
- ☐ Casa de Luxo Algarve
- ☐ Casa De luxo2
- ☐ Casa Sapo
- ☐ casas de luxo
- ☐ Casas en Net
- ☐ Casas en Web
- ☐ cena das oportunidades
- ☐ certificaçao
- ☐ DepoisApagas
- ☐ destaque da semana
- ☐ Downtown
- ☐ Embargado
- ☐ Emprendimento
- ☐ enviar para arranjo
- ☐ etiqueta 2 imoveis
- ☐ Fonte-CasaSapo
- ☐ Fonte-CustoJusto
- ☐ Harathi
- ☐ high
- ☐ highlight
- ☐ Highlight
- ☐ Imóveis da Semana Banner
- ☐ Imoveis Regiao Centro
- ☐ Imovel Costeiro
- ☐ johnny's tag
- ☐ Kamicasa

5. Finally, click the **"Save opportunity"** button.

6. After completing these steps, other actions should be done to fully complete each opportunity, such as:

- Add notes, documents, visits or tasks;
- View associated contacts or visits to the property;
- Add proposals from potential customers;
- Associate ou discard properties to the opportunity;
- 'Choose' a property that has a higher probability of closing the deal;

7. During the marketing process, each opportunity should be classified as "**HIGH**" (high probability to sell/ rent / list the property) or "**LOW**" (low probability to sell/ rent / list the property), according to the probability of closing the deal.

8. After the opportunity has been monitored and closed, it should be classified as **"WON"** or **"LOST"**.