

## 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.

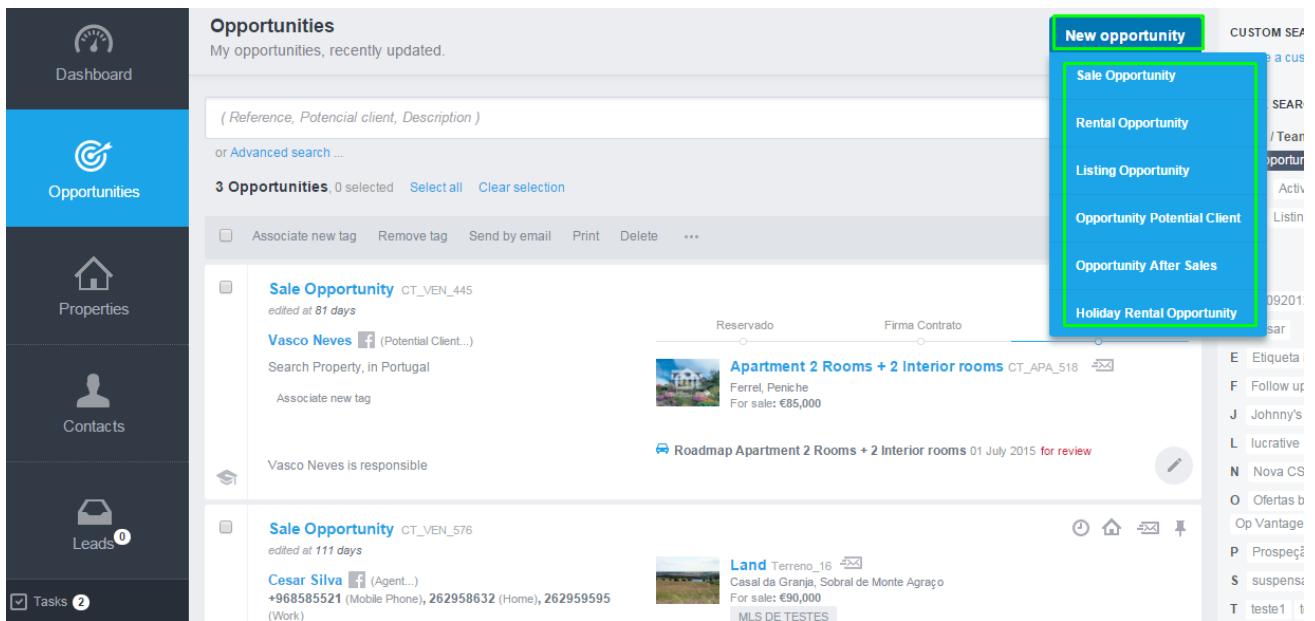
All monitoring and necessary actions to close a deal are done in the 'Opportunities' tab. Opportunities can originate from two sources: manual insertion or internet leads.

To manually insert an opportunity, take the following steps:

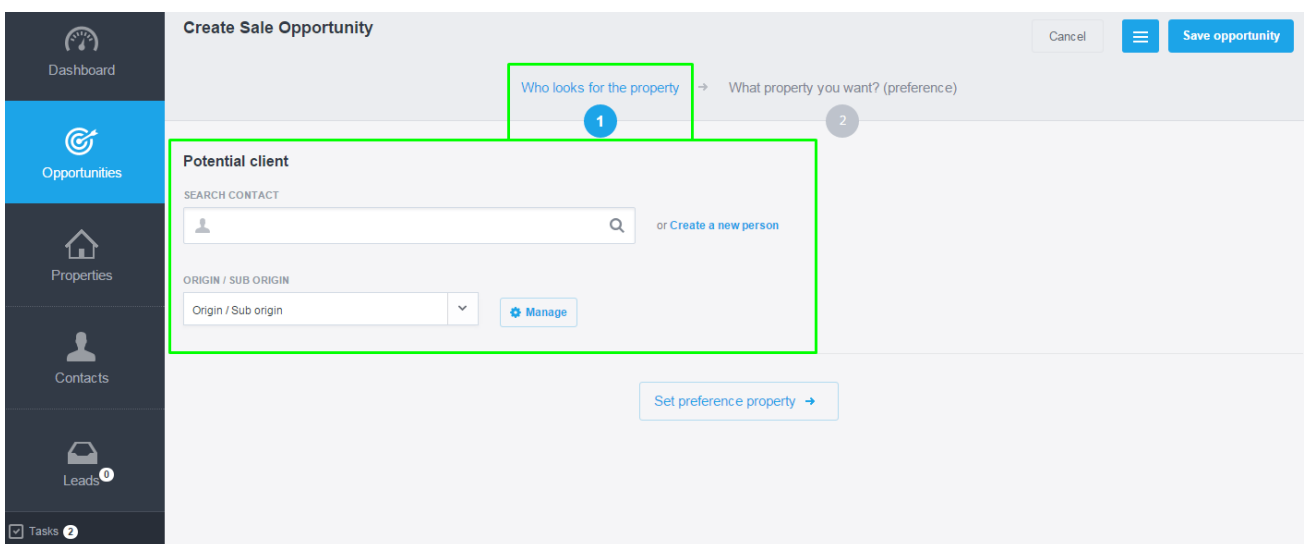
1. Open the "Opportunities" tab and click "New opportunity";

The screenshot displays the 'Opportunities' management interface. On the left sidebar, the 'Opportunities' icon is highlighted with a green box. In the top right corner of the main content area, a 'New opportunity' button is also highlighted with a green box. The interface shows a search bar with the placeholder '( Reference, Potencial client, Description )' and a magnifying glass icon. Below the search bar, it indicates '13 Opportunities, 0 selected' with links for 'Select all' and 'Clear selection'. A toolbar contains actions like 'Associate new tag', 'Remove tag', 'Send by email', 'Print', 'Delete', and a star icon. The main list shows two opportunity cards. The first card, 'Sale Opportunity VEN\_21', is 'edited at 5 days' and lists 'João Carlos Costa' as a potential client with contact details. It includes a search description: 'Search Apartment or House, for For sale, between 2 Rooms to 3 Rooms, from 75000 € to 1500000 €, in Porto, Porto or in Lisboa, Portugal or in Lisboa, Portugal'. The second card, 'Apartment 2 Rooms APA\_27', is 'Sold' for '€250,000' and includes a 'Roadmap' icon and a 'reviewed' status. At the bottom, a progress bar shows stages: 'Primeiro contacto', 'Visitas', and 'Propostas'.

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.

**Create Sale Opportunity** Cancel Save opportunity

Who looks for the property → **What property you want? (preference)**

1 2

OPPORTUNITY DESCRIPTION

**Location property**

COUNTRY: Portugal | DISTRICT: Choose district | TOWN: Depends on the distr | NEIGHBORHOOD: Depends on the towr | ZONE: Depends on the neig

[Add location](#)

**Price, Number of Bedrooms and Area**

NO. OF ROOMS: Rooms from | PROPERTY MAXIMUM PRICE: € | MINIMAL AREA DESIRED: m²

**Property type**

Apartments  Buildings  Commercial Properties  Farms and Estates  Garages  Houses  Land  Offices  Shops  Warehouses

Apart-Hotel  Apartment  Attic  Bedroom

Building Floor  Condominium Room  Duplex  Flat

Ground floor  Living Room  Loft  Penthouse

Studio  Two-flat

**Business deal** *For sale*

For sale  To rent  Auction  Exchange

Holiday Rentals  Short term rental  Transfer Ownership

**Status**

New  Used  For refurbishment  In project

Refurbished  Remodelled  To demolish or rebuild  Under construction

With Incentive Program for Rehabilitation

▼ 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
- certificação
- DepoisApagas
- destaque da semana
- Downtown
- Embargado
- Empreendimento
- enviar para arranjo
- etiqueta 2 imoveis
- Fonte-CasaSapo
- Fonte-CustoJusto
- Harathi
- high
- highlight
- Highlight
- Imóveis da Semana Banner
- Imoveis Realiza Centro
- Imovel Costeira
- iohnnv's tao
- Kamir.casa

**Availability** *Available, Reserved*

Available
  In evaluation
  Potential
  Rented

Reserved
  Sold
  Withdrawn

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**Advanced Settings**

REFERENCE: CT\_VEN\_585
 PERSON RESPONSIBLE: Vasco Neves
 TEAM: Team

COUNTRY: Country
 TARGET PRICE: €

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**Other contacts** [+ Associate contacte](#)

SEARCH CONTACT: 
 TYPE: All

5. Finally, click the **“Save opportunity”** button.

**Create Sale Opportunity** *Advanced Settings* Cancel ☰ **Save opportunity**

REFERENCE: CT\_VEN\_585
 PERSON RESPONSIBLE: Vasco Neves
 TEAM: Team

COUNTRY: Country
 TARGET PRICE: €

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**Other contacts** [+ Associate contacte](#)

SEARCH CONTACT: 
 TYPE: All

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**Extra fields**

VALOR DA AVALIAÇÃO: 
 TESTE LEAD:

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▶ Who can see this opportunity  
 ▶ Who can edit this opportunity ⓘ

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Set who looks for the property ← **Save opportunity**

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;

The screenshot displays a CRM interface for a 'Sale Opportunity' (CT\_VEN\_445) managed by Vasco Neves. The interface includes a progress bar at the top with stages: EN DECISIÓN (0%), VISITAS (0%), RESERVADO (0%), FIRMA CONTRATO (0%), and FINALIZADA (0%). The main content is divided into several sections:

- WHAT PROPERTY YOU WANT? (PREFERENCE):** A search bar for properties in Portugal.
- MATCHED:** A list of properties including 'Apartment CT\_APA\_597', 'House 4 Rooms CT\_MOR\_421', 'House CT\_MOR\_595', 'Apartment CT\_APA\_591', and 'House CT\_MOR\_596'.
- PROPERTY CHOSEN:** Details for 'Apartment 2 Rooms + 2 Interior rooms CT\_APA\_518' by Ferrel, Peniche, priced at €85,000.
- PROPOSAL:** A proposal from Vasco Neves for €195,000, accepted by Pedro Lourenço (Owner).
- VISITS:** A 'Roadmap visit' scheduled for 01 July 2015.
- RECENT TASKS:** No recent tasks are listed.
- ADD NOTE:** A section at the bottom for adding notes to the opportunity.

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.

This screenshot shows the same CRM interface as above, but with the 'HIGH' classification selected in the status dropdown menu at the top right. The progress bar remains at 0% for all stages.

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



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