

Gomocha FSP Portal: Create Customer

Last updated by | David Mishler Gomocha | May 6, 2025 at 4:30 PM GMT+2

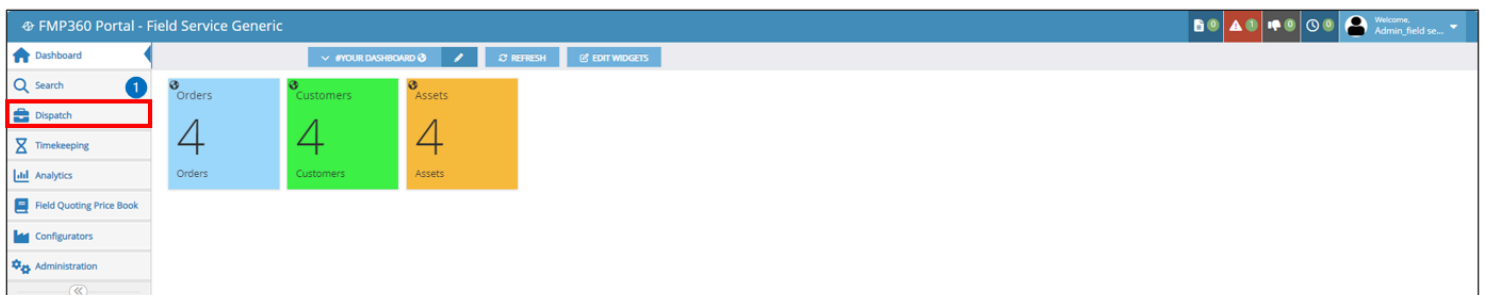


Gomocha FSP Portal: Create Customer

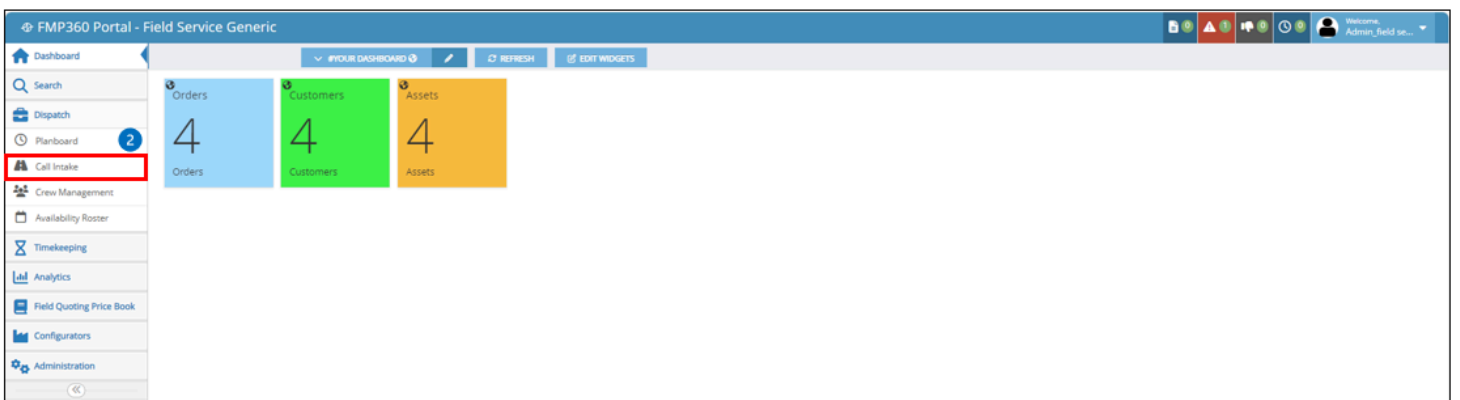
- Legacy Layout
- New Menu Structure
- [Adding New Customers Tutorial](#)

Gomocha FSP Portal Legacy Layout

Step 1: From the Dashboard, select “Dispatch” from the menu

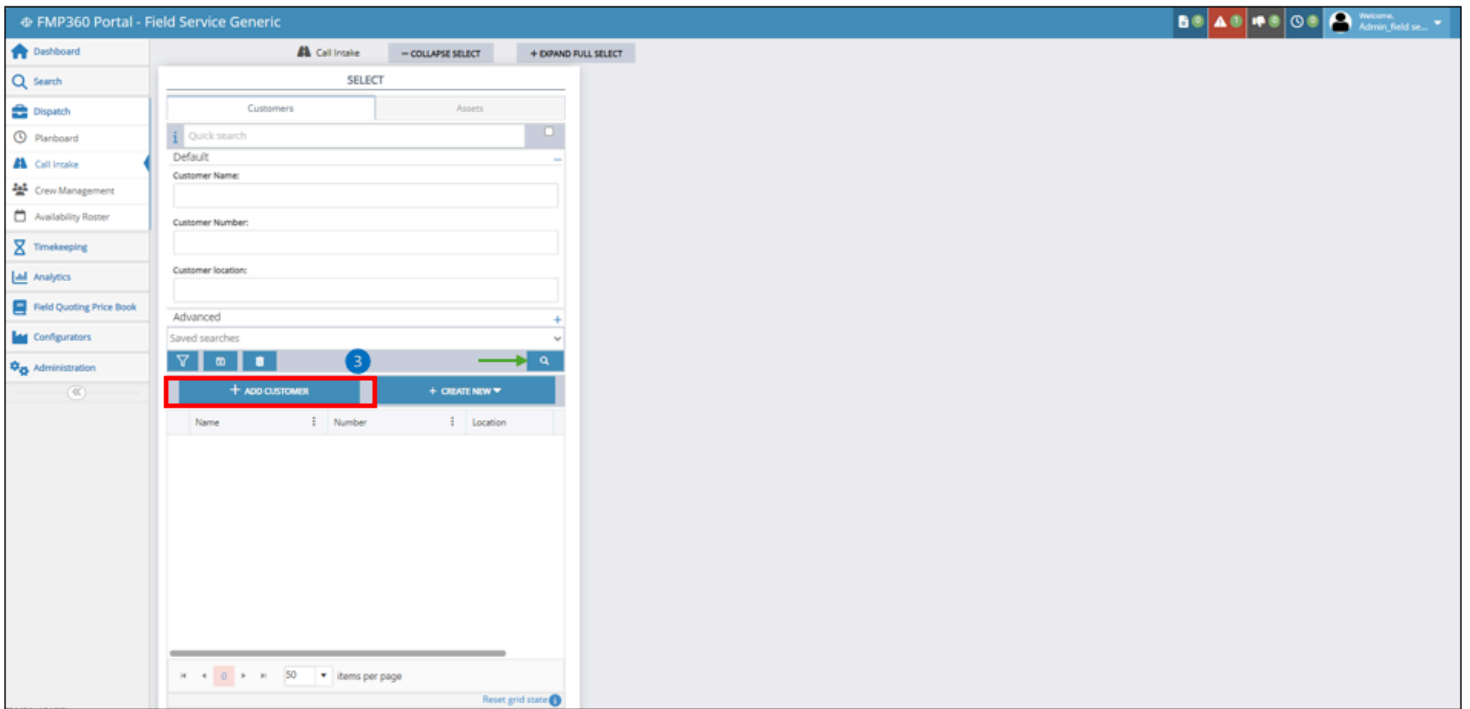


Step 2: Select “Call Intake” from the "Dispatch" menu

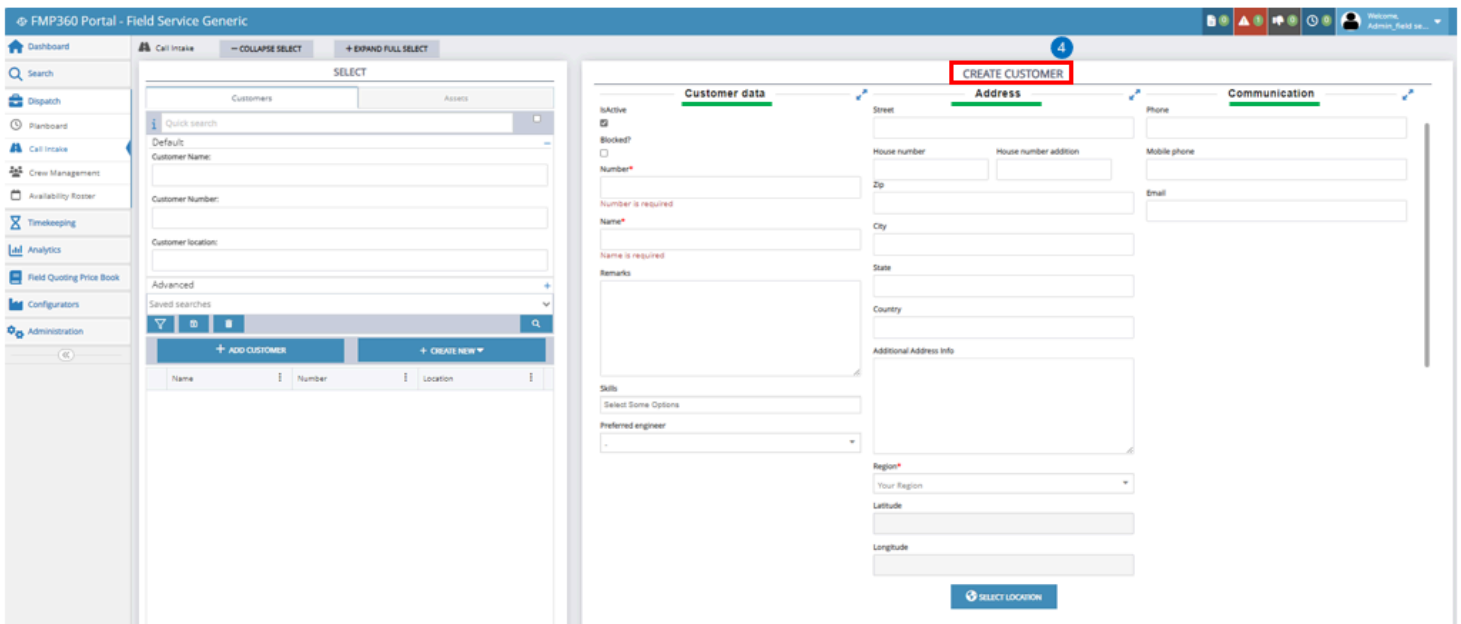


Step 3: Click on “+Add Customer”

- **Note:** Clicking on the search icon will display the list of all current customers

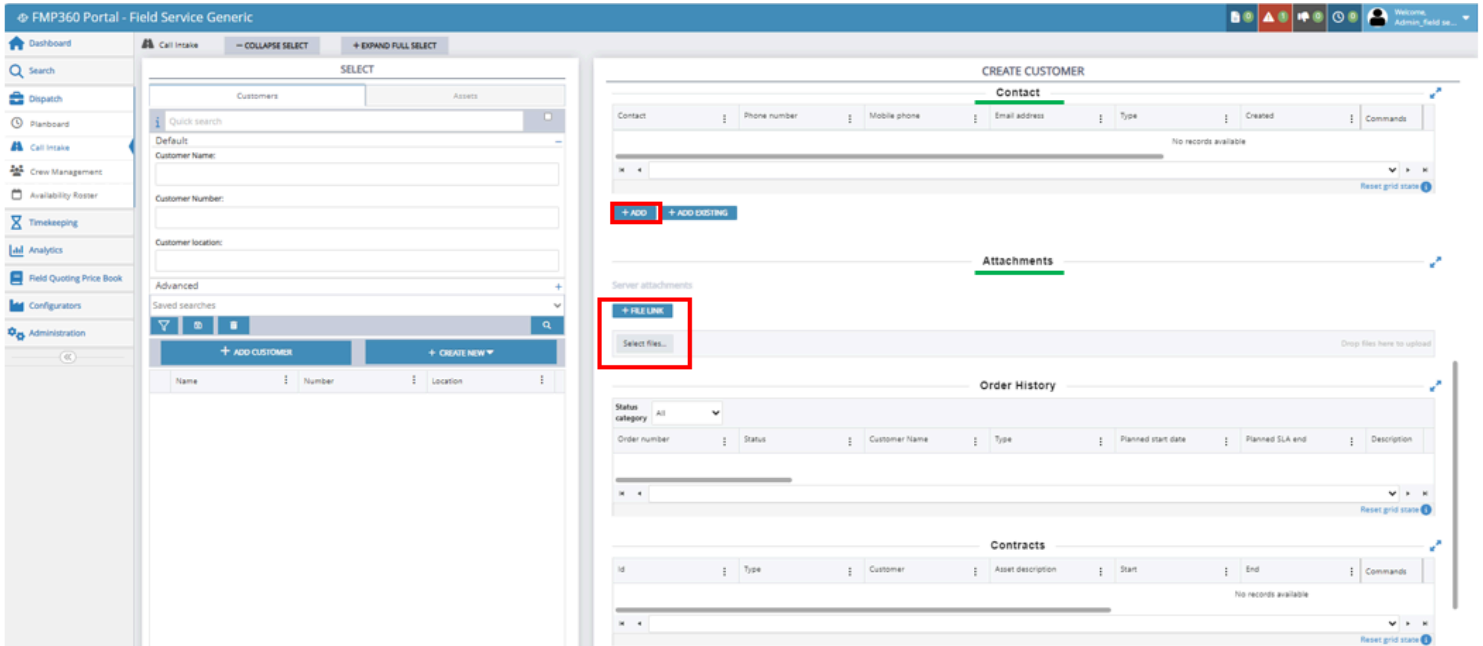


Step 4: Fill in the **required information**, indicated in red with a red asterisk) on **“Create Customer”** Screen



Step 4 Continued: Additional items:

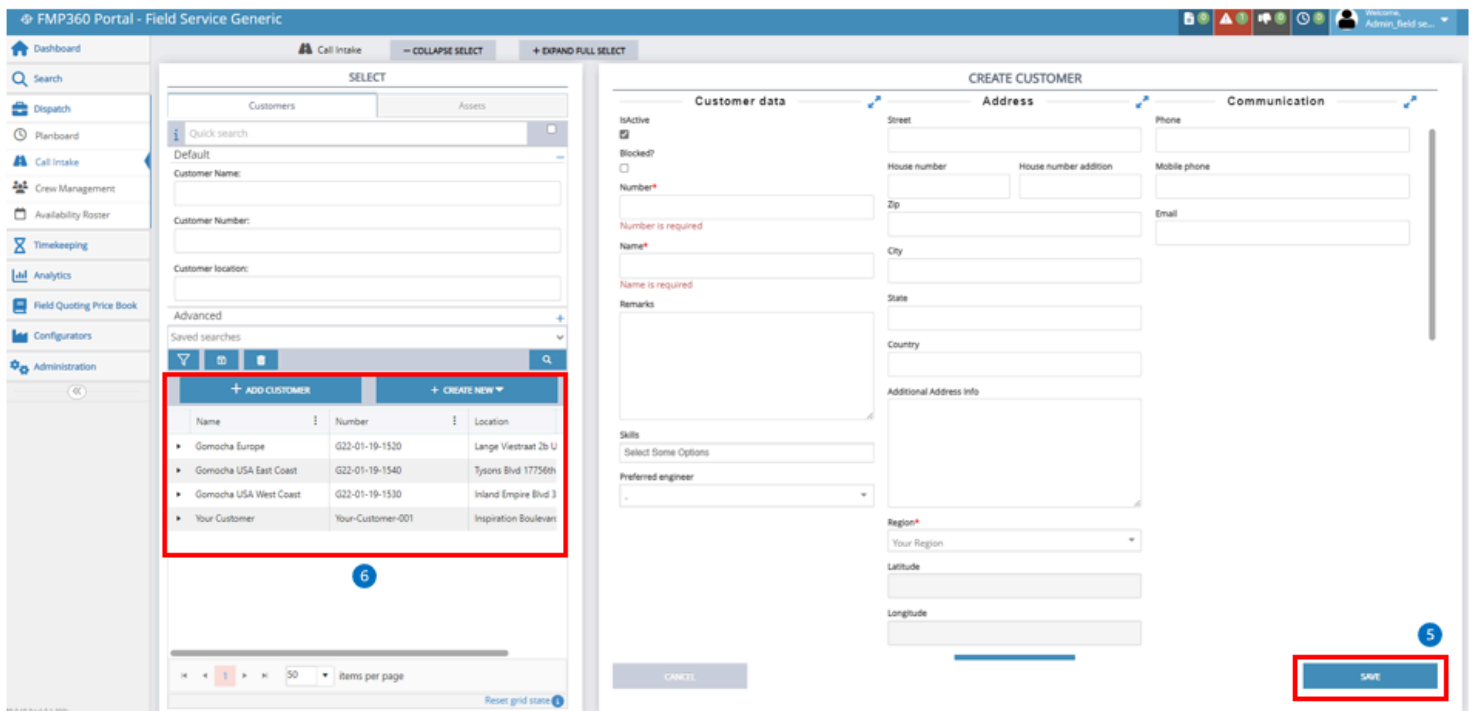
- **Contact-** select "+add" and fill in the required information in the pop-up screen (not shown), save
- **Attachments-** files can be added by selecting "+File Link" and providing a URL or "Select Files" and uploading from computer
- **Contracts-** contracts can be added per customer, this will be covered in another entry



Step 5: "Save"

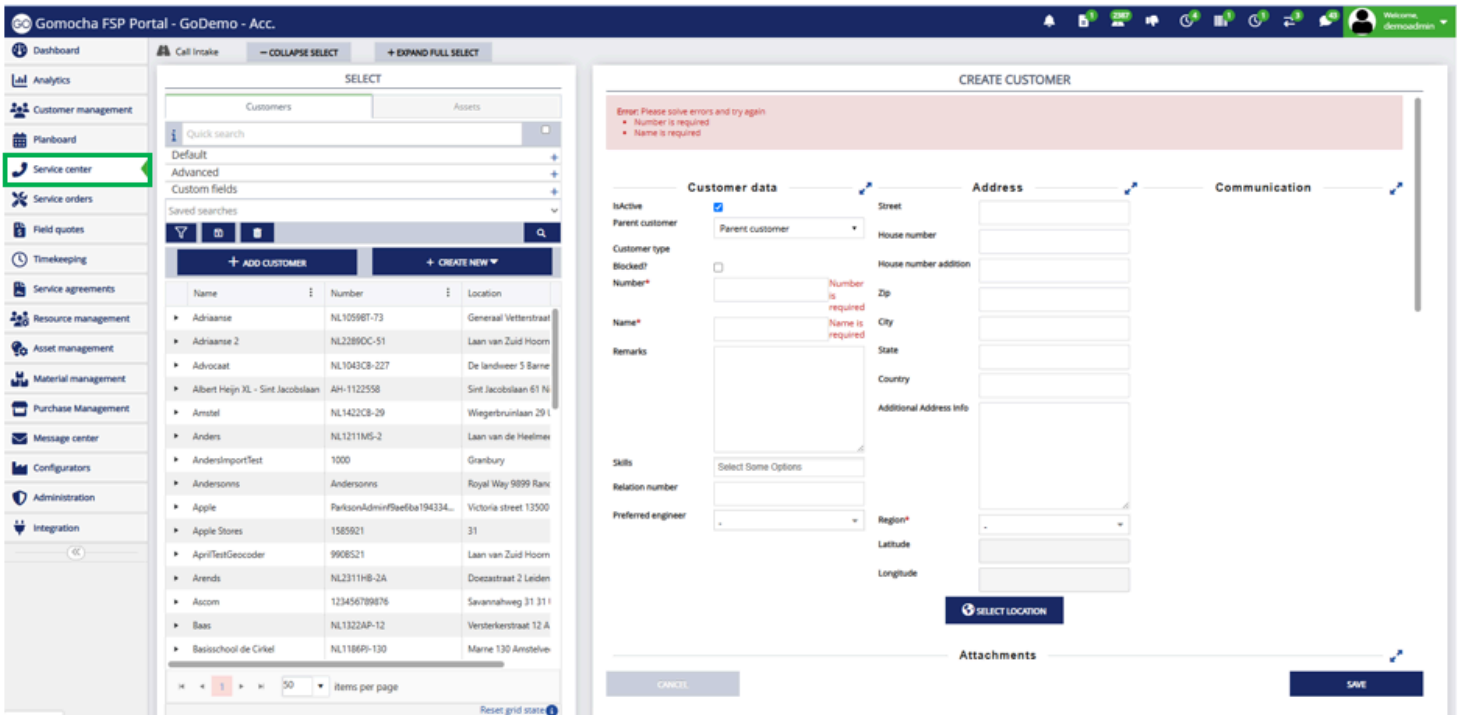
Step 6: Go back to "Customer List" and click on the search icon.

- New customer will now populate on customer list
- New orders can now be created for this customer



Gomocha FSP New Menu Structure

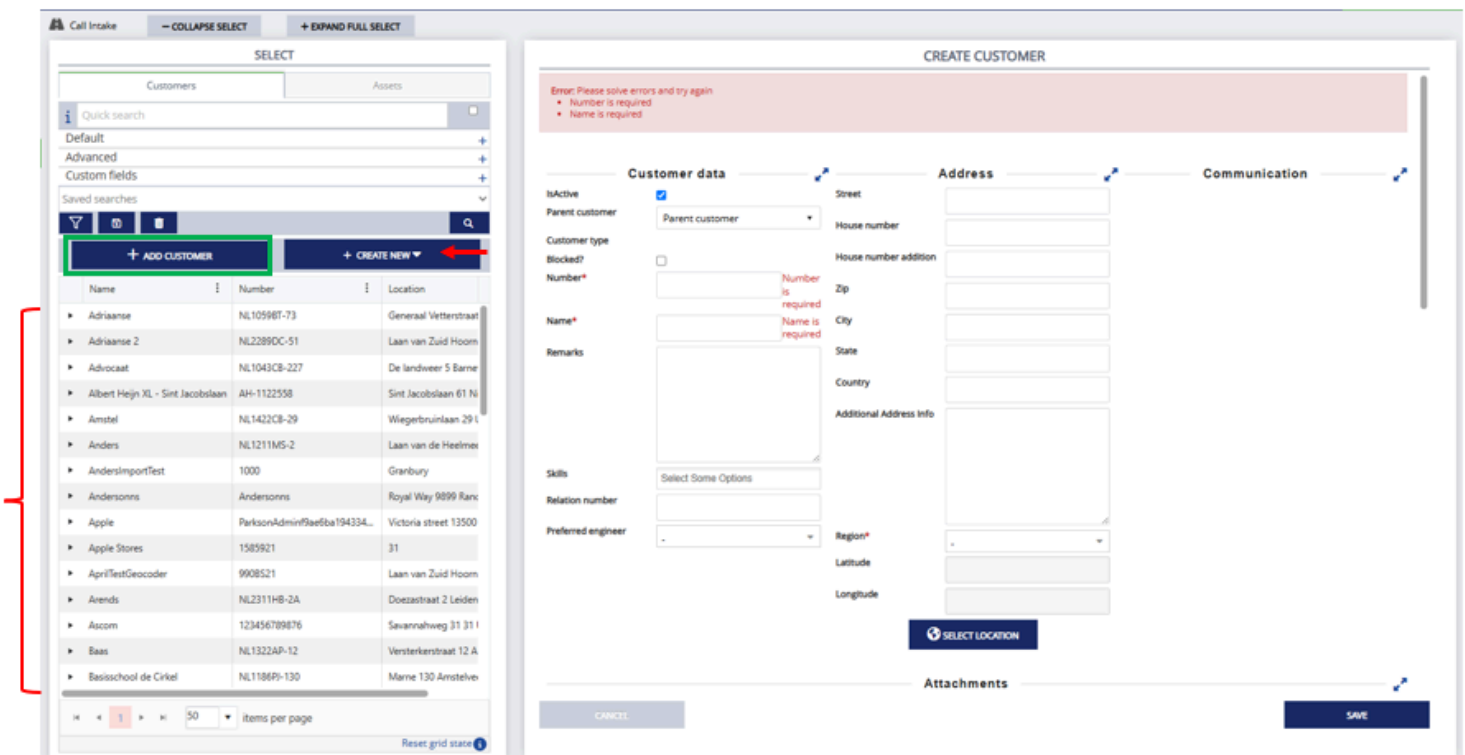
Step 1: From the Menu, select **Service Center**



The following steps are the same as **Steps 3-6** in the legacy version:

Click **+Add Customer**

- **Note:** Clicking on the search icon will display the list of all current customers



Fill in the **required information**, indicated in red with a red asterisk on **“Create Customer”** Screen

SELECT

Customers Assets

Quick search

Default

Advanced

Custom fields

Saved searches

+ ADD CUSTOMER + CREATE NEW

Name	Number	Location
Adriaanse	NL10598T-73	Generaal Vetterstraat
Adriaanse 2	NL22890C-51	Laan van Zuid Hoom
Advocaat	NL1043CB-227	De landweer 5 Barne
Albert Heijn XL - Sint Jacobslaan	AH-1122358	Sint Jacobslaan 61 Ni
Amstel	NL1422CB-29	Wiegerbruinlaan 29 I
Anders	NL1211M5-2	Laan van de Heelme
AndersImportTest	1000	Granbury
Andersonns	Andersonns	Royal Way 9899 Rank
Apple	ParksonAdminRaefba194334...	Victoria street 13500
Apple Stores	1585921	31
AprilTestGeocoder	9908521	Laan van Zuid Hoom
Arends	NL2311HB-2A	Doezastraat 2 Leiden
Ascom	123456789876	Savannahweg 31 31 I
Baas	NL1322AP-12	Versterkerstraat 12 A
Basisschool de Cirkel	NL1186PJ-130	Marne 130 Amstelve

Items per page

CREATE CUSTOMER

Error: Please solve errors and try again

- Number is required
- Name is required

Customer data

IsActive

Parent customer Parent customer

Customer type

Blocked?

Number* Number is required

Name* Name is required

Remarks

Skills

Relation number

Preferred engineer

Address

Street

House number

House number addition

Zip

City

State

Country

Additional Address Info

SELECT LOCATION

Communication

Region*

Latitude

Longitude

Attachments

CANCEL SAVE

Additional items:

- **Contact-** select "+add" and fill in the required information in the pop-up screen (not shown), save
- **Attachments-** files can be added by selecting "+File Link" and providing a URL or "Select Files" and uploading from computer
- **Contracts-** contracts can be added per customer, this will be covered in another entry

CREATE CUSTOMER

Attachments

Server attachments

+ FILE LINK

Select files...

Drop files here to upload

Contact

Primary contact	Contact	Phone number	Mobile phone	Email address	Type	Commands
No records available						

+ ADD

+ ADD EXISTING

Order History

Status category: All

Order number	Status	Customer Name	Type	Planned start date (without time)	Planned start date
No records available					

Contracts

Id	Type	Customer	Asset description	Start	End	Commands
No records available						

CANCEL

SAVE

Save Customer and Go back to **Customer List** and click on the search icon.

- New customer will now populate on customer list
- New orders can now be created for this customer



New Portal Menu and Layout: Create Customer in Customer Management

The redesigned Gomocha FSP Portal allows users to efficiently create and manage customers via the **Customer Management** section.

To create a new customer:

1. Navigate to **Customer Management** from the main menu.
2. Click on **+ Create Customer**.
3. On the **Create Customer** screen, follow the same field entry steps used in the previous portal version.
4. Once the new customer is saved, their record can be accessed in two ways:
 - **Customer Management > Customers**: Opens the **Search** screen with "Customer" pre-selected, enabling fast lookup of existing records.
 - **Service Center**: Accessible from the main menu. This replaces the former **Call Intake Screen** and provides a full list of all customer records.

Gomocha FSP Portal - GoDemo - Acc.

Call Intake -- COLLAPSE SELECT + EXPAND FULL SELECT

SELECT

Customers Assets

Quick search

Default +
Advanced +
Custom fields +
Saved searches

+ ADD CUSTOMER + CREATE NEW

Name	Number	Location
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▶ Adriaanse 2	NL2289DC-51	Laan van Zuid Hoom
▶ Advocaat	NL1043CB-227	De landweer 5 Barne
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1 50 items per page

Reset grid state