

# RELEASE NOTES



## GOMOCHA FSP Release 5.2.3

June 30, 2025

### **Gomocha Field Service Platform**

Forward-Looking Field Service Operations

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# IMPORTANT NOTES

## CREATE QUOTE GROUPS WITHOUT SELECTING AN ASSET

You can now create quote groups without linking them to an asset. This makes it easier to offer new assets to customers in the field. A new setting in the function block controls whether an asset is required, keeping the default behavior for existing setups.

## NEW BADGE SHOWS PENDING SYNC MESSAGES IN THE APP

A counter badge has been added to the sync icon to show how many messages still need to be sent when the app hasn't finished syncing. This helps engineers see when the app is still catching up after being offline or unable to sync with the server.

## QUOTE OVERVIEW FUNCTION BLOCK CONFIGURATION REQUIRED

To enable Quote Access from Order Details, a new datasource must be added to fetch the quote based on the activity's `quote_id`. This datasource must be linked to a `QuoteOverview` function block added to the order details screen. Ensure all quote creation or editing functionality is disabled in this screen configuration.

# CLIENT APPLICATION VERSIONS

This release includes the following client application versions:

Platform	Version
Core Application	5.2.3.0
Android	5.2.3
iOS	5.2.3
Windows	5.2.3.0

# NEW FEATURES SUMMARY

## ASSET-FREE QUOTING MODE

### What It Is

This enhancement introduces a flexible quoting capability within the application that allows users to create quotes without being tied to a specific asset. Previously, quote creation was locked behind asset selection, limiting the quoting workflow to existing installations or known equipment. That limitation is removed.

### What It Does

Users can now generate complete quotes—groups, lines, features, pricing—without having to first select or associate an asset. All quoting functions, including the critical “get price” logic, continue to operate seamlessly in this asset-agnostic mode. The feature is configurable: system administrators can decide whether asset association is mandatory by toggling a setting at the function block level. For organizations that rely on asset-based workflows, the default behavior remains unchanged, preserving backward compatibility.

### Why It Matters

Not every quote starts from an existing asset. Sales teams often engage customers to offer *new* products or services—whether it’s proposing a first-time installation, upselling an upgraded machine, or quoting a service package on unknown infrastructure. Requiring an asset in these cases becomes a blocker. This update removes that friction, making the quoting experience more adaptive to real-world sales scenarios and unlocking use cases that were previously forced offline or into workarounds.

### Value Delivered

- Enables quoting for new assets or services without predefined asset context
- Eliminates unnecessary admin steps, speeding up the quoting process
- Maintains robust pricing and configuration logic, with no feature degradation
- Respects existing workflows via opt-in configuration

# NEW FEATURES SUMMARY

## ORDER-TO-QUOTE TRACEABILITY LINK

### What It Is

A direct link from a service order to its originating quote, available in both the FSP app and the portal.

### What It Does

Adds a clickable link on the service order screen that opens the related quote. This allows users to quickly view the original quote details from which the order was created, without navigating away or searching manually.

### Why It Matters

Users often need to reference the original quote after an order is created, whether to verify scope, pricing, or service context. Previously, they had to search for it manually or rely on memory. This streamlines that workflow.

### Value Delivered

- Saves time by eliminating the need to cross-reference quotes manually
- Reduces errors due to missing or misinterpreted quote context
- Provides immediate visibility into quote details from the order screen
- Keeps quoting data read-only to avoid unintended edits

# NEW FEATURES SUMMARY

## AUTO-FORECAST QUOTED MATERIALS TO SERVICE ORDER

### What It Is

A feature that automatically transfers materials listed in a signed quote into the generated service order as forecasted items.

### What It Does

When a quote is accepted and an order is created, all materials from the quote are automatically added to the order as forecasted usage. These materials become directly visible and accessible to both planners and technicians in the FSP platform.

### Why It Matters

Planners and technicians need to know what was agreed upon in the quote to properly prepare and execute the work. Manually re-entering materials is inefficient and prone to errors. Missing this context can lead to delays, incorrect resource planning, or misaligned customer expectations.

### Value Delivered

- Eliminates manual entry of quoted materials into service orders
- Ensures accurate alignment between sales agreements and field execution
- Provides immediate visibility for planners and technicians into expected materials
- Reduces risk of missing or incorrect materials during service delivery
- Speeds up order preparation and improves overall workflow efficiency

# NEW FEATURES SUMMARY

## CREATE ORDERS WITHOUT AN ORDER NUMBER AND EASILY LINK BACK FROM YOUR BACK OFFICE SYSTEM

### What It Is

An improvement that makes it easier for your system to create service orders in Gomocha without needing to supply a Gomocha-specific order number. It also lets you look up the order in Gomocha using your own internal reference number.

### What It Does

When your back office system sends a new order to Gomocha, it no longer needs to include a Gomocha order number. Gomocha will automatically generate one and send it back. Your back office system can then store this number and use it for any future updates to the order. If needed, you can look up the Gomocha order number at any time using the original order number from your back office system. This ensures both systems stay aligned and makes it easy to track and manage the order lifecycle.

You can also request an ID from Gomocha early in your process, even before sending all order or quote details. This helps your team track work more efficiently from the beginning.

### Why It Matters

Since most orders start in your back office system, there's no reason to manage extra order numbers manually. This update streamlines the process, removes unnecessary steps, and matches how orders are created directly in the Gomocha portal. It helps you keep both systems in sync without extra effort.

### Value Delivered

- Simplifies order creation from your back office system
- Eliminates the need to manage separate Gomocha order numbers
- Makes it easy to connect and track orders across systems
- Reduces errors and improves data consistency
- Speeds up the overall workflow between planning and execution

# NEW FEATURES SUMMARY

## LEAD AND QUOTE MANAGEMENT WORKFLOW ENHANCEMENT

### What It Is

This feature introduces a structured and enforceable workflow within the Gomocha FSP platform to manage Prospects and Customers. It governs how leads are captured, engaged, quoted, and converted into active customers, while keeping track of all interactions and follow-ups in a consistent manner.

### What It Does

Every Prospect must have a recorded origin, such as website form or referral, with options maintained in master data. When a quote is sent, the Prospect can review, give feedback, and accept or reject it. Acceptance triggers automatic customer and service order creation. New Prospects can be added into Gomocha FSP for tracking and conversion. Users can classify entities as either Prospect or Customer, which controls whether a quote or order is allowed. Sales and service staff log follow-ups using Engagement Notes. Each note or email must include a required follow-up action like "Call this week," also maintained in master data.

### Why It Matters

This feature enforces a consistent and structured approach to managing the lead funnel. It removes ambiguity around lead sources, makes sales tracking more robust, and supports automated transitions from quote to service execution. By requiring classification and tracking follow-ups explicitly, it gives operational teams tighter control and visibility over the customer lifecycle.

### Value Delivered

- Reduces manual admin work by automating customer and order creation
- Increases accountability with clear lead and quote tracking
- Improves CRM data quality through required input fields and classifications
- Strengthens conversion analysis by standardizing lead source and follow-up data
- Prevents missed opportunities with structured engagement tracking

# DELIVERED ITEMS - NEW FEATURES

ID	Title
38669	As an FSP App user, I want to create quotes without requiring an asset so I can offer new assets to customers in the field
38743	As an FSP Portal user, I want to create quotes without requiring an asset so I can use quoting logic for new asset proposals
39464	As an FSP App user, I would like to have the link on the order to open the related quote
39465	As an FSP Portal user, I want a link on the order to open the related quote for quick reference and context
39466	As an FSP Portal user, I want quoted materials from the signed quote to be added as forecasted materials in the generated order
40053	As a system, I want to generate a unique order number when creating a new order through the Gateway API
40470	As an FSP Portal user, I want to manage follow-up engagement codes in master data to support consistent engagement tracking
40478	As an FSP Portal user, I want to create and manage engagement notes with follow-up actions on prospect and customer records
40499	As an FSP Portal user, I want to manage and automate prospect and customer classifications to control quote and order permissions
40511	As an FSP Portal user, I want to register a new prospect so they can be tracked and converted into a customer
40521	As an FSP Portal user, I want to manage Lead Channel master data so I can maintain valid sources for prospect origination
40550	As a prospect, I want to review, sign, and submit a quote to become a customer and trigger order creation

# DELIVERED ITEMS - QUALITY IMPROVEMENTS

ID	Title
39110	Portal   Order reverts back to "Planned" or "Unplanned" after completing the order
39369	Flow Transition Service   Performance degradation due to flow transition service
39377	Portal   Saving contact person on order fails due to duplicate entry
39454	Customer Portal   Mandatory fields moved to Ungrouped still visible
39550	Portal   Boolean custom fields not copied in Split Order functionality
39681	Portal   Custom fields unexpectedly disappear and reappear after XML export due to inconsistent activation logic
39717	Portal   Unable to save asset type visible custom fields without selecting at least one custom field
39812	Mailtool   Debrief export to ERP blocked due to reportmailgroup errors after R5.2.0 update
39902	Gateway   "Start shift" option missing for users created with 'Timekeeping user' role
40104	Portal   Inactive materials still trigger Material Suggestion creation
40138	Portal   No search results returned for some languages (e.g., fr-ca)
40164	App - CustomerAsset Functionblock   Asset type filter not applied, all assets shown
40362	Portal   Saved search name reverts to default label after page refresh despite being saved correctly
40756	Flow Transition Webservice   Failed jobs not retried before deletion, causing missed executions
40777	Portal   Unable to create new Answer Type due to existing conflicting entry
40814	Flow Transition   SLA not set correctly during order enrichment
40822	Portal   Password reset not working
40828	App - Discussion Functionblock   Special characters in Discussion message cause generic error
40860	Portal   Material management menu still visible after role removal
40896	Portal   Order grouping job fails or skips orders due to engineer flag error and grouping logic issues

ID	Title
40907	Mailtool   Email subject missing after update
41094	Portal   Questionlist prefill uses description instead of external ID
41228	Gateway   Field missing in ACK export message
41243	Portal   Question list import is not validating whether all custom answer types are present
41245	App - Question List   Published question list does not open in app
41337	Communicator   Orders delayed significantly when arriving in FSP
41342	Client Communication Service   XML files in 'ServicebusToClientCommunicationService' folder not processed
41436	Portal   Cannot plan inspection order with negative decimal in custom field
41437	OrderWebservice   Unplanned orders not synced to Scheduler due to order number length exceeding limit
41624	Database   Work order not received by back office due to missing fields in export message after update
41653	Database   Sign link in quote email not working due to missing PDF at send time
41688	Report   Stock Overview report returns no results
41760	Database   Quote export sometimes includes incorrect Contactperson ID