

Prospect Management: Engagement Notes

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40478 As an FSP Portal user, I want to create and manage engagement notes with follow-up actions on prospect and customer records | Done

A screenshot of the "Engagement Notes" form in the FSP Portal. The form is titled "Engagement Notes" and has a "Title*" field with a placeholder "Add Title Here". Below the title field is a rich text editor with a toolbar containing icons for undo, redo, paragraph, bold, italic, bulleted list, numbered list, link, and unlink. The main body of the form is a large text area with a placeholder "Create the body of the note here". Below the text area is a "Follow up needed" section with a red border. It contains an "Engagement Code" field with a dropdown menu showing "2 Day Follow Up", an "Action Date*" field with a date picker showing "6/22/2025, 11:29 AM", and an "Add" button. Below the "Add" button is a "Just a random note" section with a text area containing "sdfhdf" and a "Reply" button. Below the "Reply" button is a "Note 2" section with a text area containing "Assign the best technician for the job. Easily assign orders to your field service techs based on their location, job progress, daily agenda, skill set, and other factors." and a "Reply" button. At the bottom right of the form is a "Mark as completed" button.

Recording

[40478 - Prospect and Customer Engagement Notes video capture.mp4](#)

Description

Users can track follow-up actions on customers and prospects. Capture the notes from the interactions and it will provide your team with the timeline of engagements.

Sales and service staff can log follow-up activities—such as calls, tasks, and reminders—against Leads, Prospects, and Customers.

A new dashboard widget provides real-time visibility into key follow-up metrics, including:

- **Open follow-ups** categorized by **Reason Code** and **Days Since Last Attempt**

- **Tasks due today**
- **Stalled Prospects**
- **Open Quotes**

Value

- Stay on top of every lead with structured follow-ups. Smart reminders and reason codes ensure consistent contact, turning more site visits into service contracts. Your entire team knows exactly who needs attention and when.
- This feature provides a centralized space to log follow-up tasks and capture detailed notes from calls, emails, and meetings—ensuring that all interactions are documented, actionable, and accessible to relevant stakeholders.
- Additionally it:
 - Improves follow-up reliability and deal velocity
 - Reduces knowledge loss across handoffs
 - Enhances personalization in customer communication
 - Supports team transparency and reporting

Gomocha Pillars

- **Efficiency:** Centralizes follow-up data to streamline workflows and reduce oversight.
 - **Flexibility:** Adapts to different team roles and sales cycles with customizable filters.
 - **Enablement:** Equips staff with actionable insights to prioritize outreach and close deals faster.
 - **Performance:** Boosts responsiveness, improves follow-up consistency, and increases conversion rates.
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Main Flow/Use Steps & Output

- Gomocha FSP Portal > Customer Management > Customers > Search Customers_ > Open a **Prospect or Customer** record.
- Scroll to **Engagement Notes View Notes Overview**: The system displays a **reverse chronological list of notes** related to the selected record.
- **Create New Note**:
 - Enter a **Title** and **Note Body**.
 - Optionally fill in the following fields:
 - **Action Date**
 - **Engagement Code**
 - **Follow-Up Needed** (auto-assigned based on input):

- Set to **“Not Needed”** if both Action Date and Engagement Code are empty.
 - Set to **“Needed”** if both fields are populated.
- Click Blue **ADD** button: The button will only be available if all necessary fields have been completed
- **Notes Overview Refresh:** The system **refreshes the list of notes**, displaying the newly saved note at the top.
- Once note has been added Users can:
 - Reply to notes
 - Mark as completed according to engagement codes or action dates

The screenshot shows a web application interface for 'Engagement Notes'. At the top, there's a header bar with the name 'Sarah Novak'. Below it, the 'Engagement Notes' form is displayed. The form includes a title field, a rich text editor for the note body, and two dropdown menus: 'Engagement Code' (set to '2 Day Follow Up') and 'Action Date' (set to '6/23/2025, 11:29 AM'). A red box highlights these fields and the 'Add' button. Below the form, there is a list of notes. The first note is titled 'Just a random note' and the second is 'Note 2'. Both notes have a 'Reply' button. The 'Note 2' entry also has a 'Mark as completed' button.

Reporting

- New report shows open follow-ups by Engagement Code and Days Since Last Attempt, To-Do Today, Stalled Prospects, Open Quotes.



Prospect management - rate conversion from prospect to customer

Customer	Email	Phone	Reason	Last Attempt	Days since
Amstel	lnavarro@gomocho.com;jtalines@gomocho.com	555-3082326		18.06.2025	2
Amstel	lnavarro@gomocho.com;jtalines@gomocho.com	555-3082326	2 Day Follow Up	18.06.2025	2
Amstel	lnavarro@gomocho.com;jtalines@gomocho.com	555-3082326	5 Day Follow Up	18.06.2025	2
WHITONDAE30			5 Day Follow Up	19.06.2025	1
Sarah Novak			5 Day Follow Up	19.06.2025	1
Sarah Novak			5 Day Follow Up	19.06.2025	1
Sarah Novak				19.06.2025	1
WHITONDAE30			2 Day Follow Up	19.06.2025	1
Sarah Novak			2 Day Follow Up	19.06.2025	1
Sarah Novak			2 Day Follow Up	19.06.2025	1
WHITONDAE30				19.06.2025	1
Sarah Novak				19.06.2025	1
david				20.06.2025	0

Related Page

[Prospect Management: Follow-Ups](#)