

Prospect Management: Follow-Ups



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40470 As an FSP Portal user, I want to manage follow-up engagement codes in master data to support consistent engagement tracking | Done

The screenshot shows the Gomocha FSP Portal interface. The left sidebar contains a navigation menu with items like Dashboard, Analytics, Customer management, Planboard, Service center, Service orders, Field quotes, Timekeeping, Service agreements, Resource management, Asset management, Material management, and Purchase Management. The main content area is titled "Master data manage" and includes a "Select master data type" dropdown menu set to "Follow up codes". Below this is a search bar and checkboxes for "Show active items only" and "Use translation". A table lists existing follow-up codes with columns for Id, Name, and a status icon. To the right of the table are buttons for "SAVE ITEM" and "ARCHIVE ITEM", and a form to create a new item with fields for Id, Name, Description, and Standard follow up time.

Description

- Each Note or Email related to a Prospect—and optionally a Customer—must include a follow-up requirement (***e.g., Call this week, Call next quarter, Keep in contact***).
- The list of available follow-up codes is maintained in the **master data**, allowing for consistent tracking and easy updates.
- A new **dashboard widget** displays **open follow-ups**, categorized by **Reason Code** and **Days Since Last Attempt**, giving users clear visibility into follow-up status and priorities.

Value

Classification Management: Control Your Sales Pipeline with Precision

- Move prospects through your sales process with confidence. Automatically promote qualified leads to customer status when quotes are signed, triggering immediate order creation.
- Perfect for manufacturing services where timely fulfillment impacts production schedules.

Gomocha Pillars

- **Efficiency:** Standardizes follow-up tracking and reduces missed opportunities.

- **Flexibility:** Allows easy updates to follow-up codes based on changing business strategies.
- **Enablement:** Gives staff a clear view of upcoming tasks and stalled prospects for better prioritization.
- **Performance:** Improves responsiveness and customer engagement by surfacing timely follow-up actions.

Main Flow/Use Steps & Output

1. From the Gomocha FSP Portal: User selects Administration > **Master Data**.
2. System shows Master data management page > User selects entity **Follow-up code**.
3. System shows Follow-up Code overview screen.
4. Too add new item > User clicks Add New button.
5. System shows new Follow-Up Code form with the fields.
 - Id
 - Name
 - Description
 - Standard follow up time
6. User completes the form and clicks Save.
7. System validates data, assigns status Active, Created by and Creation Date, and refreshes the Follow-Up Code overview.

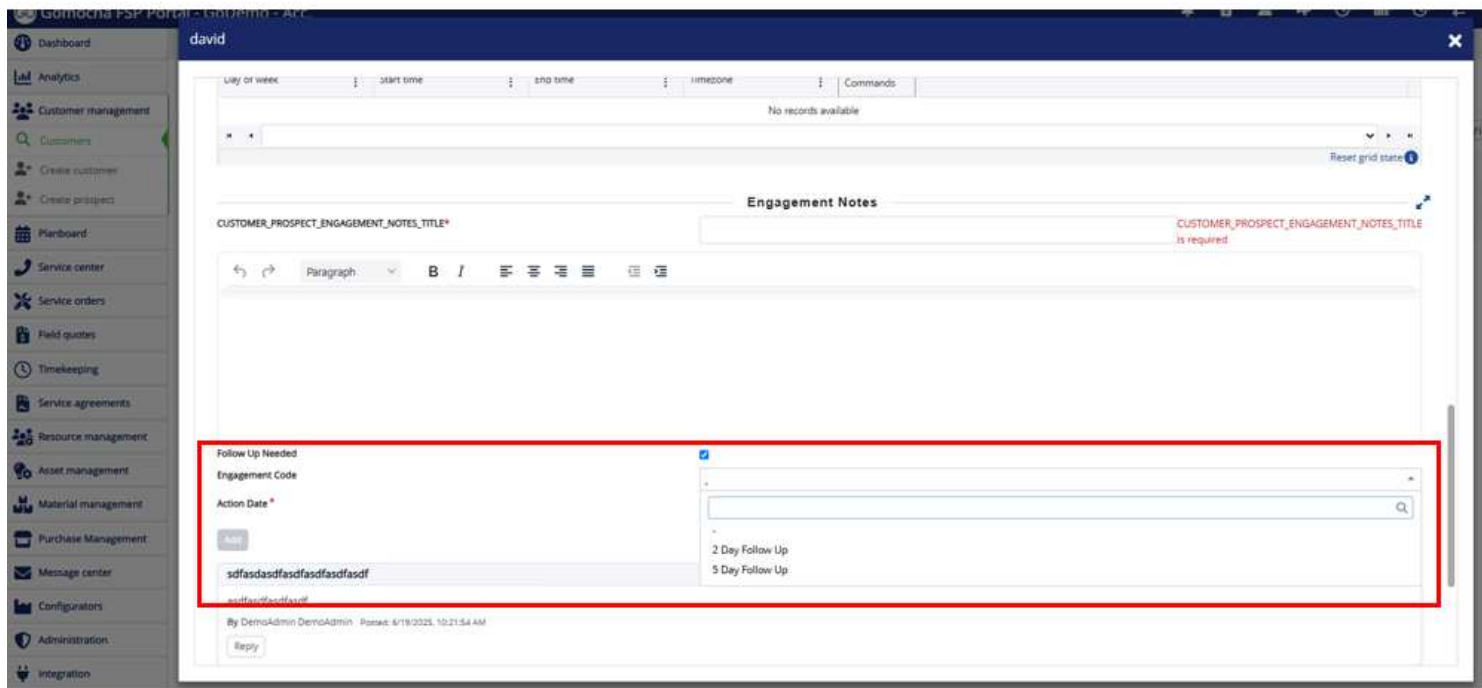
The screenshot shows the 'Master data manage' interface. On the left, a sidebar lists various management options. The main area displays a form for adding new master data items. The form includes fields for ID, Name, Description, and Standard follow up time. A red arrow indicates the flow from the 'ADD NEW MASTER DATA ITEM' button to the form fields.

Id	Name	
1 Month Follow Up	1 Month Follow Up	
Week 2 Follow Up	Week 2 Follow Up	
Week 1 Follow Up	Week 1 Follow Up	

Form fields:

- SAVE ITEM
- ARCHIVE ITEM
- ID*: 1 Month Follow Up
- Name*: 1 Month Follow Up
- Description: Follow up after 1 month
- Standard follow up time: 30
- Must be in days

Follow-up/Engagement Code on Prospect/Customer Details



Related Page

[Prospect Management: Engagement Notes](#)