

Prospect Management: Lead Channels



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40521 As an FSP Portal user, I want to manage Lead Channel master data so I can maintain valid sources for prospect origination | Done

A screenshot of a web application interface for managing lead channels. The interface has a sidebar on the left with a red border. The sidebar contains a "Preferred engineer" dropdown, a "Lead channel" section with a search bar and a list of channels, and a "Server attachments" section. The "Lead channel" list includes "Cold Calls", "Email Campaigns", "Facebook", "Google Ads", "LinkedIn", and "Test" (which is highlighted in blue). A green bracket highlights the search bar and the list. To the right of the sidebar, there are input fields for "Latitude" and "Longitude".

Description

- For every Prospect—and optionally for each Customer—it is required to specify the origin of the lead, such as **Website Form, Trade Show, Referral, or Cold Call**. The list of available lead sources is maintained within the system's master data.

Value

Know Which Marketing Channels Deliver Results

- Increases transparency of marketing channels
- Track exactly where your best leads come from. Customize lead sources to match your specific marketing efforts—trade shows, referrals, web forms, or industry-specific channels.
- Perfect for manufacturers and construction services needing to maximize ROI on marketing investments.

Gomocha Pillars

- Efficiency:** Standardizes lead source tracking to reduce data inconsistencies and manual follow-ups.
- Flexibility:** Supports dynamic business needs by allowing easy updates to lead source options in the master data.

- **Enablement:** Gives teams better insight into lead generation channels to inform sales and marketing strategies.
- **Performance:** Improves reporting accuracy and supports better decision-making through consistent data collection.

Main Flow/Use Steps & Output

Create or View Lead Channels in Master Data

1. From the Gomocha FSP Portal: **User selects Administration > Master Data.**
2. From Master Data page **User** selects entity **Lead Channel** from the drop-down list
3. **System** shows Lead Channel overview (all active lead channels)
4. To create a new Lead Channel **User** clicks **+Add New Master Data** button.
5. **System** shows new Lead Channel creation screen with the fields.
 - Id
 - Name
6. **User** completes the form and clicks **Save.**
7. **System****validates data**, assigns **status Active**, **Created By** and **Creation Date**, and refreshes the Lead Channel overview.

The screenshot displays the 'Master data manage' interface. On the left, a sidebar menu includes 'Master data' which is highlighted with a green box. The main content area is titled 'Master data manage' and features a 'Select master data type' dropdown menu with 'Lead channel' selected, indicated by a red arrow. Below this is a table of existing lead channels, outlined with a red box:

External id	Name	
LI-001	LinkedIn	
CC-002	Cost Calls	
GA-001	Google Ads	
F-001	Facebook	
EC-001	Email Campaigns	

Below the table is a '+ ADD NEW MASTER DATA ITEM' button. To the right, the 'Add New Master Data Item' form is visible, with fields for 'External id*', 'Name*', and 'Description', each with a 'Test' button. The 'External id*' and 'Name*' fields are highlighted with a green box. A 'SAVE ITEM' button is located at the top right of the form.

Selecting/Using Lead Channels

1. Follow the standard procedure for registering a new Prospect.
2. On the **Create Prospect** screen, the user should locate the **Lead Channel** field.
3. From the **dropdown menu**, the user can select an existing lead source or choose from any newly created lead channels.
4. Complete the prospect registration and **save** the record.

Note: If the **Lead Channel** field is not visible, it must be added via the **Portal Layout Configurator**.

Gomocha FSP Portal - GoDemo - Acc.

CREATE PROSPECT

Error: Please check errors and try again

- Region is required
- Name is required
- Number is required

Customer data

Name* Name is required

Number* Number is required

Parent customer

Tax exempt

Blocked?

Customer type

Blocked?

Skills

Remarks

Preferred engineer

Lead channel

Address

Street

House number

House number addition

Zip

City

Country

State

Additional Address Info

Communication

Phone

Mobile phone

Email

Attachments

SELECT LOCATION

Region is required

Latitude

Longitude

Cancel attachments

Apply

Customer/Prospect Details Screen

CUSTOMER DETAILS

+ CREATE NEW ▼ + ADD ASSET IMPORT ASSET OPEN QUOTES FIELD QUOTING PRICE BOOK

Customer data

IsActive Yes

Parent customer -

Blocked? No

Customer type Customer

Number trevona

Name trevona

Remarks -

Skills -

Relation number -

Preferred engineer -

Lead channel Cold Call

Classification Customer

Address

Street -

House number -

House number addition -

Zip -

City -

State -

Country -

Additional Address Info -

Region NC

Latitude -

Longitude -

Communication

Reporting

New SSRS report - Prospect management - rate conversion from prospect to customer

organisation_id 76

locale_id 1033

user_id 997

Start Date

View Report

End Date

1 of 1

100%

Report

Organisation: GoDemo - Acc.

Created by:

Creation date: 2025-06-19

Prospect management - rate conversion from prospect to customer

Lead Channel	Prospects	Converted To Customer Count	Conversion rate
Cold Calls	2	1	50.00%
Email Campaigns	1	0	0.00%
Facebook	2	1	50.00%
Google Ads	1	1	100.00%
LinkedIn	1	0	0.00%
Test	3	1	33.33%

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