

Prospect Management: Prospect & Customer Classification



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40499 As an FSP Portal user, I want to manage and automate prospect and customer classifications to control quote and order permissions | Done

A screenshot of a web application interface for managing prospect and customer classifications. The interface includes a "Lead channel" dropdown, a "Classification*" dropdown, and a "Prospect" search bar. The "Classification*" dropdown is highlighted with a green border. The "Prospect" search bar has a search icon and a dropdown menu with "Customer" (highlighted in blue) and "Prospect" options. To the right of the search bar are fields for "Regio", "Latitu", and "Longi".

Description

- Planners or system administrators can classify each account as either a Prospect or a Customer. This classification determines whether a quote can be issued and/or an order can be created.

Value

Gomocha Pillars

- Efficiency:** Eliminates ambiguity, enabling quicker quoting and order creation.
- Flexibility:** Supports evolving business processes with adaptable classification logic.
- Enablement:** Equips teams with clear parameters for engaging prospects and customers.
- Performance:** Enhances sales flow and customer conversion through structured processes.

Main Flow/Use Steps & Output

- From the Gomocha FSP Portal: **User opens customer or prospect record:** Customer Management > Customers > Search Customer/Prospect
- User clicks "Edit Customer"** option.

3. **User selects field "Classification".**
4. **System displays available classifications** (Prospect, Customer).
5. **User selects a classification** (Prospect, Customer).
6. **User selects Save**
7. **System saves the classification** to the customer record.
8. **User sees that save was successful** and the updated classification

The screenshot shows the 'Edit prospect' form in the Gomocha FSP Portal. The form is divided into several sections: 'Customer data', 'Address', and 'Communication'. The 'Customer data' section includes fields for Name, Number, Parent customer, Tax exempt, Is Active, Customer type, Blocked?, Skills, and Remarks. The 'Address' section includes fields for Street, House number, House number addition, Zip, City, Country, State, and Additional Address Info. The 'Communication' section includes fields for Phone, Mobile phone, and Email. The 'Classification' field is highlighted with a green box, showing a dropdown menu with 'Prospect' and 'Customer' options. The 'Customer' option is selected. The form also includes a 'SELECT LOCATION' button and an 'Attachments' section.

Alternate Flow (Automated Classification)

- In some scenarios, the system may automatically classify a customer based on predefined rules (e.g., a quote accepted by a prospect promotes them to a customer).
 - Flow transition Server should be able to update "Customer Classification" based on signed quotes on a Customer with a specific Customer Classification.
- The system notifies the user of the change and updates available actions accordingly.