Prospect Management: Prospect & Customer Classification

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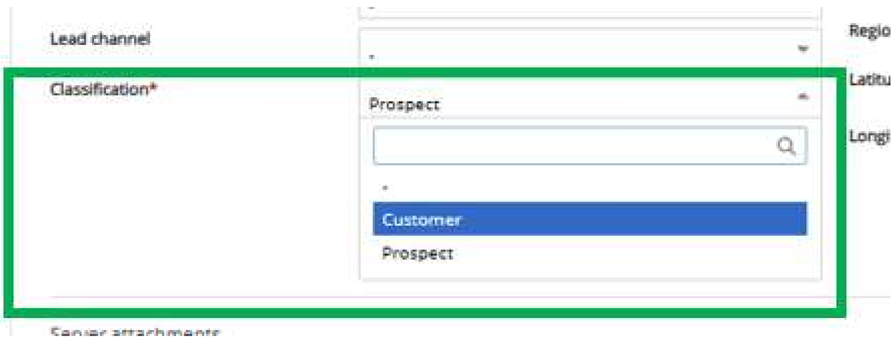
40499 **As an FSP Portal user, I want to manage and automate prospect and customer classifications to control quote and order permissions** | Done



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

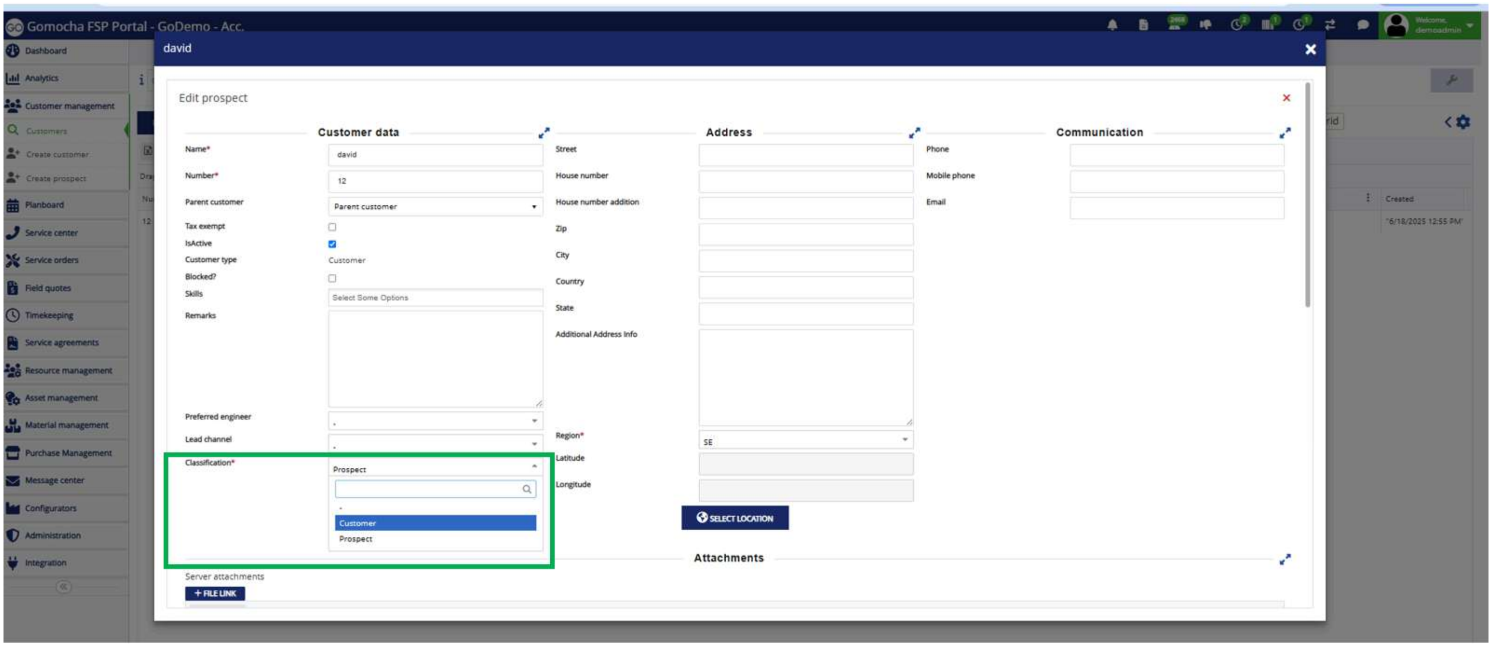
Gomocha Pillars

- **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

1. From the Gomocha FSP Portal: **User opens customer or prospect record**: Customer Management > Customers > Search Customer/Prospect
2. **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



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.