Prospect Management: Registering Prospects

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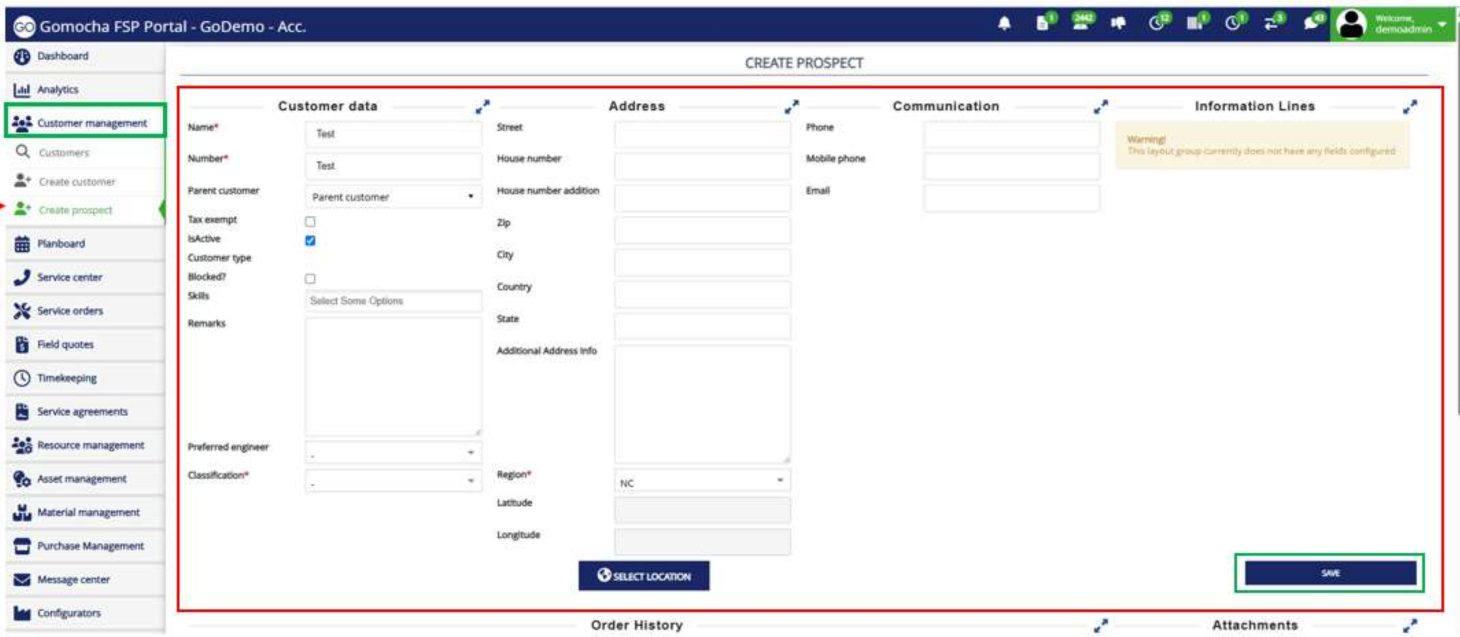
40511 **As an FSP Portal user, I want to register a new prospect so they can be tracked and converted into a customer** | Done



Description

- Add new Prospects to Gomocha FSP to enable tracking and conversion into customers.

Value

Turn Every Lead into Revenue Opportunity

- Increases transperancy of marketing efforts
- Capture crucial lead source data instantly. Every prospect gets properly tracked from first contact, so you know which marketing efforts pay off. No more guessing which channels work best—now you'll have proof
- Registering prospects before they convert keeps your **Customer** list clean while giving you full quoting power.
- Proper capture of **Lead Channel** ensures Marketing can double-down on sources that convert.
- Early registration kicks off audit trails (emails, notes) so you never lose context.

Gomocha Pillars

- **Efficiency**: Simplifies the front end of the customer lifecycle by digitizing and organizing early-stage engagement.
- **Flexibility**: Allows different teams (e.g., Sales, Onboarding) to adapt the process to their specific prospecting workflows.
- **Enablement**: Equips users with visibility into prospect status, touchpoints, and conversion potential.
- **Performance**: Supports pipeline growth and improves conversion metrics by reducing gaps in prospect follow-up.

Key Terms & Definitions

Term	Definition	Why It Matters
Prospect	An organisation or person with *potential* to buy but no revenue yet.	Enables quoting without cluttering Customer master.
Lead Channel	The source of the lead (e.g. Website Form, Trade Show, Referral).	Drives ROI reporting & campaign optimisation.
Primary Contact	Main person to reach at the prospect. Includes email & phone.	All quotes and emails default here.
Classification	System label showing lifecycle stage. Starts as *Prospect*, later becomes *Customer*.	Controls permissions (e.g. ordering).
Duplicate Check	Automated comparison of email/VAT/Tax ID against existing records.	Prevents double entries & downstream chaos.
Status	Current state of the record (Active, Converted, Stalled).	Powers dashboards & follow-up triggers.

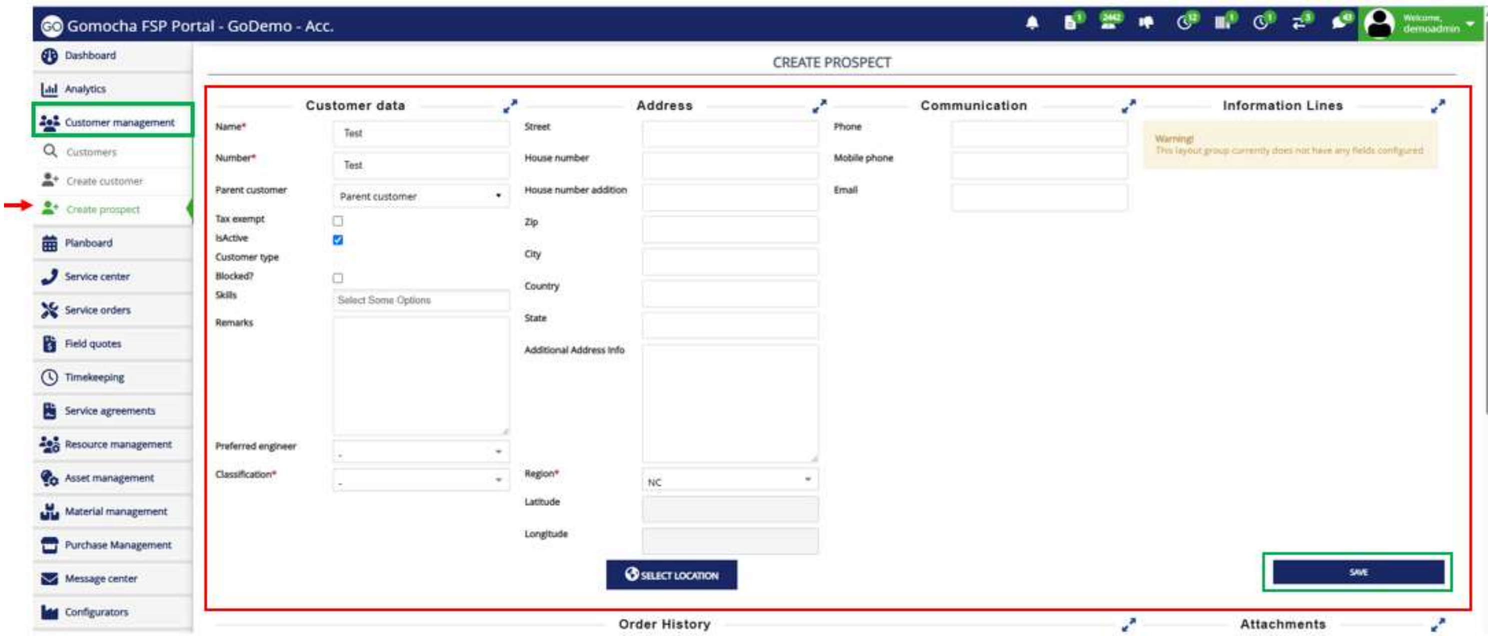
Main Flow/Use Steps & Output

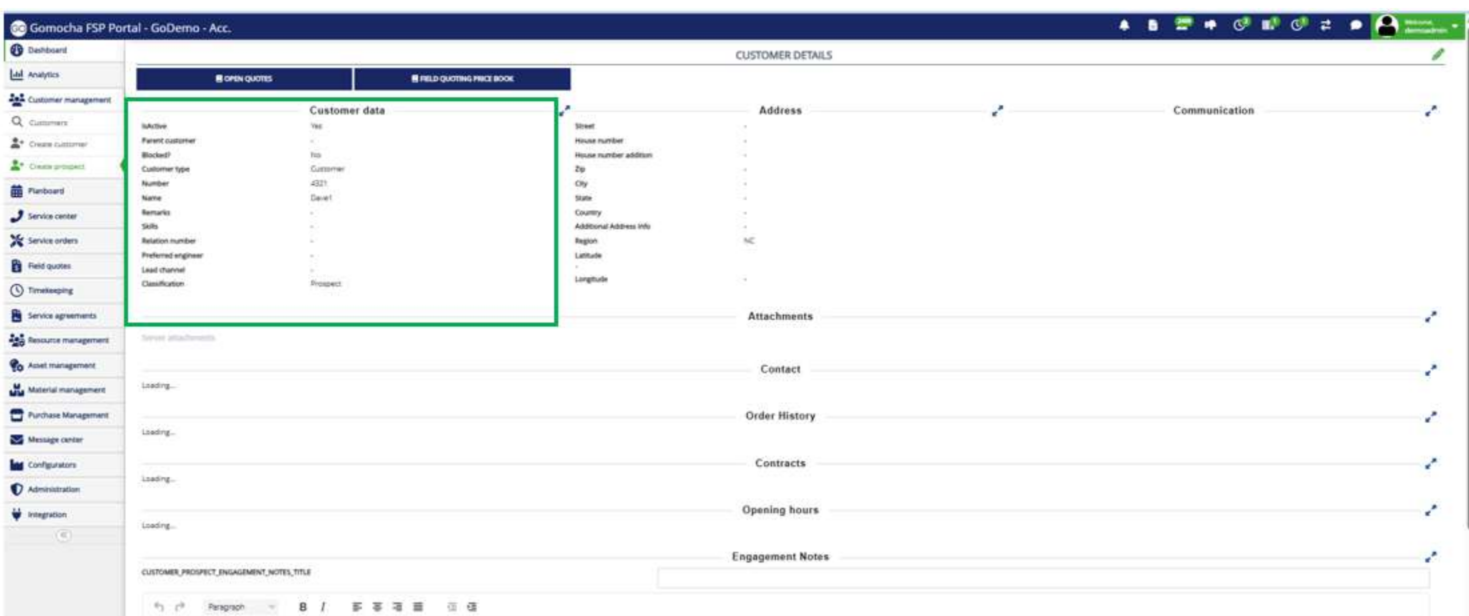
1. User selects Customer Management > Create Prospect. (See picture below)
2. System shows Create Prospect form with mandatory fields.
    - Name
    - Primary Contact Person
        - Name
        - Email address

        - Phone
    - Address
        - Street
        - Zip
        - Country
    - Lead Channel (See Use case 2)

3. User completes the form and clicks Save.

4. System validates data, assigns status Active, Created By and Creation Date, and displays confirmation.





Alternate Flow (Duplicate Check fails)

- If a customer with matching Name and Contact person email already exists, System prompts with possible duplicates and asks if this should save this new prospect or not.