

# Prospect Management: Registering Prospects



## Prospect Management: Registering Prospects

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

A screenshot of the Gomocha FSP Portal interface. The top navigation bar shows "Gomocha FSP Portal - GoDemo - Acc." and a user profile "Welcome, demoadmin". The left sidebar contains a menu with items like Dashboard, Analytics, Customer management (highlighted with a green box), Customers, Create customer, Create prospect (highlighted with a red arrow), Planboard, Service center, Service orders, Field quotes, Timekeeping, Service agreements, Resource management, Asset management, Material management, Purchase Management, Message center, and Configurators. The main content area is titled "CREATE PROSPECT" and contains a form with four tabs: "Customer data", "Address", "Communication", and "Information Lines". The "Customer data" tab is active, showing fields for Name\*, Number\*, Parent customer, Tax exempt, Is Active, Customer type, Blocked?, Skills, Remarks, Preferred engineer, and Classification\*. The "Address" tab shows fields for Street, House number, House number addition, Zip, City, Country, State, and Additional Address Info. The "Communication" tab shows fields for Phone, Mobile phone, and Email. The "Information Lines" tab has a warning message: "Warning! This layout group currently does not have any fields configured". At the bottom of the form, there is a "SELECT LOCATION" button and a "SAVE" button (highlighted with a green box). The bottom of the page shows "Order History" and "Attachments" sections.

## Description

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

## Value

### Turn Every Lead into Revenue Opportunity

- Increases transparency 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
<b>Prospect</b>	An organisation or person with <i>potential</i> to buy but no revenue yet.	Enables quoting without cluttering Customer master.
<b>Lead Channel</b>	The source of the lead (e.g. Website Form, Trade Show, Referral).	Drives ROI reporting & campaign optimisation.
<b>Primary Contact</b>	Main person to reach at the prospect. Includes email & phone.	All quotes and emails default here.
<b>Classification</b>	System label showing lifecycle stage. Starts as <i>Prospect</i> , later becomes <i>Customer</i> .	Controls permissions (e.g. ordering).
<b>Duplicate Check</b>	Automated comparison of email/VAT/Tax ID against existing records.	Prevents double entries & downstream chaos.
<b>Status</b>	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.