



23:35:60
Business Strategy
Innovation
Branding
Solutions
Marketing
Analysis
Ideas
Successes
Management

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134:23:454:12

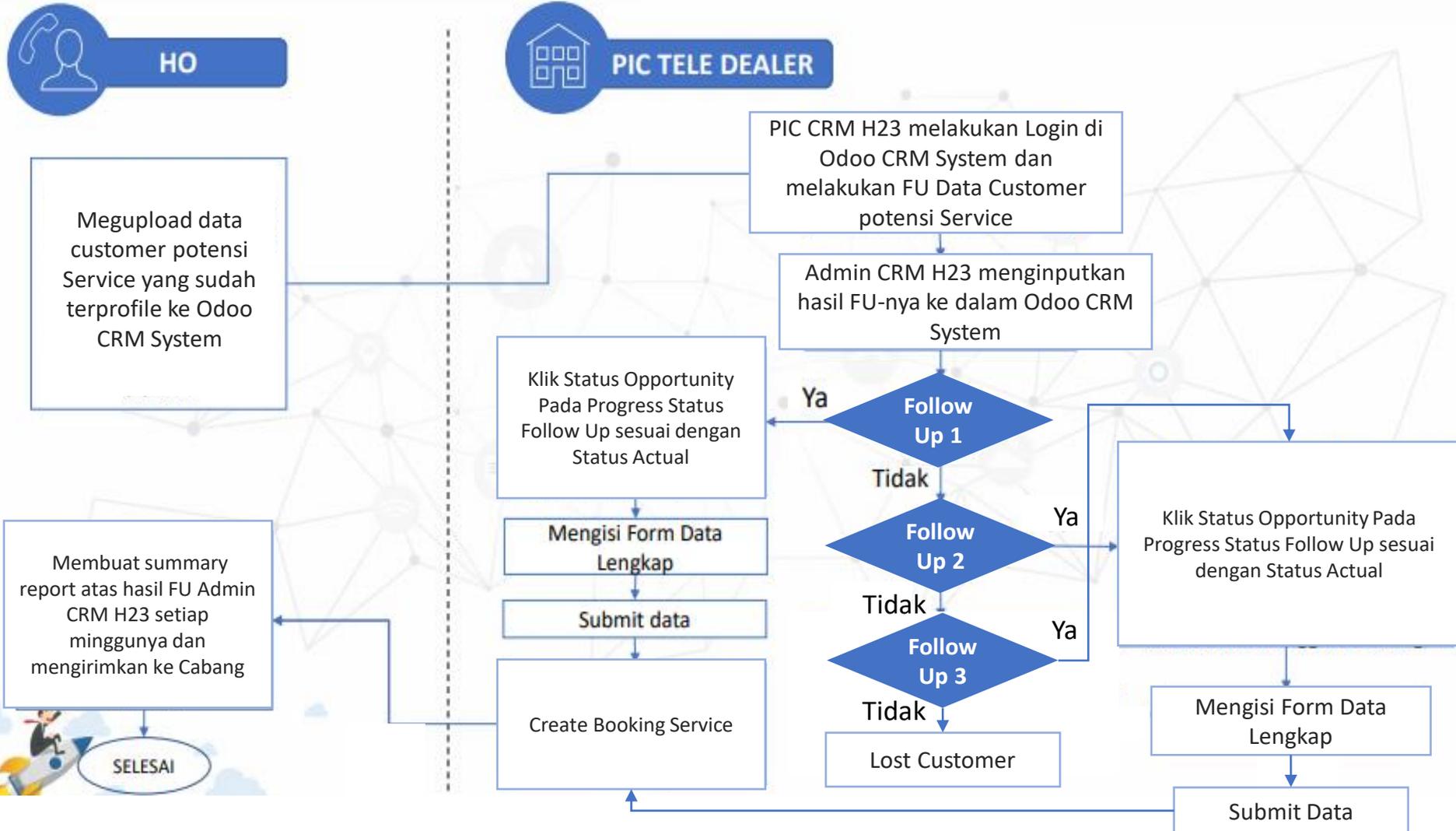


CRM Daya Motor H23 KPB dan Reguler



Flow Process CRM H23 Odoo CRM System

Flow Proses Dealer



Pihak yang terlibat dalam proses follow up



Kepala Bengkel



Kepala Cabang



PIC CRM

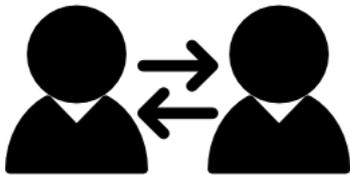


Admin CRM H23

Pihak yang terlibat dalam proses follow up

Apa untungnya jika kita melakukan follow Up ?

1



Meningkatkan kedekatan dengan customer yang berujung pada meningkatnya loyalitas.

2



Dengan proses follow up yang baik dapat meningkatkan unit sales dan unit entry secara maksimal

Aktivitas Yang Harus Dilakukan

1



Dealer memiliki SDM untuk melakukan service inviting (SMS, call, dll)



2



Memastikan Dealer memiliki SMS & telp tools untuk sms caring dan follow up Service

3



Memastikan dealer mendownload database konsumen di Odoo CRM System

4



Buat SOP & SLA untuk follow up Reminder Service

5



Tarik report secara berkala untuk monitoring status follow up

Aktivitas Yang Harus Dilakukan

5



- *SMS / Whats Up service reminder KPB 1, 2, 3, 4, dan juga regular*
- *SMS reminder / Whatsup untuk konsumen yang belum service dan melakukan booking servis pada H -7*

6



- **Call reminder & menawarkan fasilitas / program AHASS dan spare part (booking service/ service visit) kepada konsumen yang belum service KPB 1, 2, 3, 4, dan regular pada H-3**
- **Call reminder untuk konsumen yang melakukan booking servis pada pagi di hari H**
- **Follow up call max H+3 usai servis untuk :**
 - **Semua konsumen premium (All type of job)**
 - **Konsumen reguler yang melakukan heavy repair, claim, job return, light repair**

Instruksi Kerja (1st attention)



PIC	Aktivitas		Waktu
	H1-H2	H2-H2	
Admin CRM H23		melakukan first attention berupa sms reminder mengingatkan servis KPB dan regular (H-7)	H-7
Kacab/Kabeng	melakukan pendataan kepada pelanggan yang sudah dilakukan reminder service siapa yang sudah datang dan siapa yang belum datang		Tiap awal minggu

Instruksi Kerja (follow up ke 2)



PIC	Aktivitas		Waktu
	H1-H2	H2-H2	
Kacab/Kabeng	Mendistribusikan data kepada Admin CRM H23 untuk dilakukan follow up selanjutnya		H-7
Admin CRM H23 	Admin CRM H23 melakukan follow up telepon untuk pelanggan yang belum datang servis KPB dan reguler sesuai batas waktu KPB (H-3) serta menanyakan alasan belum servis karena apa.	Admin CRM H23 melakukan follow up telepon untuk pelanggan yang belum datang servis KPB dan reguler sesuai batas waktu KPB (H-3) serta menanyakan alasan belum servis karena apa.	H-3

Instruksi Kerja (Follow Up Ke3)



PIC	Aktivitas		Waktu
	H1-H2	H2-H2	
Kacab/Kabeng	Melakukan tracking atau pendataan konsumen yang dapat dilakukan visit sesuai dengan coverage area RING dealer.		Tanggal 1 tiap Bulan
Kabeng/SA	Menjadwalkan dan melakukan visit berdasarkan hasil pendataan yang dilakukan pada awal bulan.		Tiap Awal Minggu

Instruksi Kerja (Service Result)



PIC	Aktivitas		Waktu
	H1-H2	H2-H2	
Kacab/Kabeng	Memberikan data berdasarkan hasil Tarik data di system CRM dan melakukan rekap pada form monitoring follow up reminder service		Tanggal 1 tiap Bulan
Kacab/Kabeng	Melakukan tracking atau pendataan konsumen yang sudah datang service dan belum datang service KPB Own Dealer dan reguler.		Tiap Awal Minggu

Instruksi Kerja (PICA hasil follow up)



PIC	Aktivitas		Waktu
	H1-H2	H2-H2	
Admin CRM H23	Melakukan pendataan dari hasil pelanggan yang difollow up melalui Telp. Pelanggan yang tidak terhubung diberikan alasannya (direject, tidak tersambung atau SDM AHASS tidak melakukan follow up)		Pada saat melakukan f.u telp
Admin CRM H23	Pada saat melakukan follow up telepon terdapat beberapa informasi yang harus disampaikan adalah oleh Admin CRM H23 kepada pelanggan : <ol style="list-style-type: none">1. batas waktu KPB sesuai tanggal pembelian SMH2. menawarkan fasilitas AHASS (booking service atau servis kunjung)3. Menanyakan alasan kenapa tidak datang servis.		Pada saat melakukan f.u telp



Instruksi Kerja (Report & Feedback)



PIC	Aktivitas		Waktu
	H1-H2	H2-H2	
Kacab/Kabeng	Melakukan pendataan setelah proses follow up servis selesai (F.U 1 dan F.U 2). Berapa jumlah pelanggan yang datang servis KPB - Regular dan pelanggan yang tidak datang servis. Apabila pelanggan tidak datang servis, cantumkan alasannya.		Tiap awal minggu
Admin CRM H23	Mengucapkan terima kasih kepada pelanggan yang sudah melakukan servis dan menerima jika ada saran ataupun keluhan saat melakukan servis di AHASS		H+3 Setelah servis
Kepala Bengkel	Memastikan semua proses berjalan, semua data sudah dilakukan follow up dan melakukan monitoring baik secara langsung ataupun melalui PIC CRM		Setiap Minggu

Hal Yang Harus Diperhatikan

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Business Strategy
Brand
Success
Management

23:35:60



Pelaksana : Frontdesk/ Admin CRM H2

Beberapa data yang wajib diisi dan diupdate di dalam pelaksanaan FU CRM H23 Own Dealer

1



Nama sesuai STNK

5



Keterangan Konsumen sudah datang servis apa belum ?

2



Alamat sesuai STNK

6



Cara reminder KPB 2-4

3



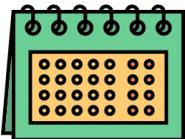
No HP & No Telp

7



Hasil Reminder

4



Tanggal Pembelian

8



Alasan konsumen tidak datang servis

Leads WOR Odoo CRM System



Catatan Leads Odoo CRM System

- ❑ Ada 2 category leads yaitu :
 1. **H1 To H2** : leads yang berasal dari data penjualan masing-masing cabang dan sudah memasuki masa service KPB atau regulernya.
 2. **H2 To H2** : Leads yang berasal dari data service masing-masing cabang dan dalam periode 2-3 bulan belum melakukan service kembali.

- ❑ Status Prospect :
 1. **HOT Prospect** : Leads dimana konsumen akan service dalam **jangka waktu 1 - 3 Hari kedepan (progress > 70% kemungkinan datang service)**.
 2. **MEDIUM Prospect** : Leads dimana konsumen akan service dalam **jangka waktu 4 - 7 Hari kedepan (progress > 50% kemungkinan datang service)**.
 3. **COLD Prospect** : Leads dimana konsumen akan service dalam **jangka waktu 7 - 10 Hari kedepan (progress > 25% kemungkinan datang service)**.

- ❑ Status Customer :
 1. **TERHUBUNG** : Status Follw up konsumen dimana **ketika dilakukan whatsapp atau sms terkirim atau dilakukan telpon terhubung atau diangkat**.
 2. **TIDAK TERHUBUNG** : Status Follw up konsumen dimana **ketika dilakukan whatsapp atau sms tidak terkirim atau dilakukan telpon no invalid atau tidak aktif**.
 3. **REJECTED** : Status Follw up konsumen dimana **ketika dilakukan whatsapp atau sms terkirim/tidak terkirim atau dilakukan telpon terhubung namun tidak diangkat atau panggilan ditolak**.

Leads Odoo CRM System



- **FORM LEADS** (Diakses melalui Odoo -> Leads -> Leads WOR)

1.

odm.daya-motor.com/web?#page=0&limit=80&view_type=list&model=crm.lead&menu_id=1294&action=1408

Messaging Showroom Workshop Sales **Leads** Master Accounting Purchases Warehouse Human Resources Website Settings

DAYA Motor HONDA

Leads WOR

Create or Import 1-80 of 73936

<input type="checkbox"/>	Creation Date	Branch	Subject	Contact Name	Country	Email	Phone	Stage	Source Document
<input type="checkbox"/>	07/09/2020 13:43:34	[A-BAN08] A TANJUNG LAYA	LDS/A-BAN08/2007/00320	M. KOSIM				Follow Up 1	
<input type="checkbox"/>	07/11/2020 12:45:51	[SAM01] SAMARINDA	LDS/SAM01/2007/01990	RESTU ANDIKA PRADANA PUTRA				New	
<input type="checkbox"/>	07/09/2020 13:43:34	[MSE01] MENGGALA	LDS/MSE01/2007/00631	DAYAT				Lost	
<input type="checkbox"/>	07/09/2020 13:43:34	[IND01] INDRAMAYU	LDS/IND01/2007/00421	TAWIR			085294233849	Lost	
<input type="checkbox"/>	07/09/2020 13:43:34	[IND01] INDRAMAYU	LDS/IND01/2007/00397	URYANINGSIH			081312995113	New	
<input type="checkbox"/>	07/09/2020 13:43:34	[BNK01] PANGKAL PINANG	LDS/BNK01/2007/00554	RESI SANDIKA			083803793582	Won	
<input type="checkbox"/>	07/09/2020 13:43:34	[GOW01] GOWA	LDS/GOW01/2007/00503	ANSAR				Follow Up 1	
<input type="checkbox"/>	07/09/2020	[BAN05] SOREANG	LDS/BAN05/2007/00972	SUTIA				Won	

Leads Odoo CRM System



Pengisian Field pada Leads

- Field atau isian **berwarna biru artinya mandatory atau wajib diisi**, Leads tidak akan bisa disave *jika field berwarna biru tidak diisi*.
- Jika cabang login menggunakan login cabang, **maka field branch akan terisi secara otomatis**.
- Untuk pengisian **field customer harap melakukan select dan copy paste pada BPA customer** Jika data customer sudah memiliki **CDDB di Odoo**, maka cabang tinggal mengisi field yang belum terisi **namun jika muncul notifikasi customer belum memiliki CDDB** maka cabang harus melengkapinya dengan mengklik tanda panah di samping kolom **Nama Customer**, secara otomatis data customer akan terisi, seperti alamat, no KTP, no tlp, dan data pembelian yang pernah dilakukan customer tersebut. Perhatikan field Last type, sales date, last product, field field tersebut akan **otomatis terisi jika customer melakukan pembelian unitnya di Daya Motor**. Kemudian jika data no ktp dan no tlp sudah ada, maka **filed priority akan terisi otomatis dengan high**.

Leads Odoo CRM System

Gambar dibawah ini, **jika customer melakukan pembelian** unit bukan dari Daya Motor.

The screenshot displays the Odoo CRM system interface. The top navigation bar includes 'Messaging', 'Showroom', 'Workshop', 'Sales', 'Leads', 'Master', 'Accounting', 'Purchases', 'Warehouse', 'Human Resources', 'Website', and 'Settings'. The 'Leads' menu item is highlighted with a red box. The main content area shows a lead record for 'LDS/A-BAN04/2007/00286'. The record details are as follows:

Branch	[A-BAN04] A KARAWITAN	Contact Name	PANGESTU .
Division	Workshop	Email	
Customer	[BPA/2004/1720353] PANGESTU	Instagram	
Address	[3200] JAWA BARAT	Facebook	
		Twitter	
		No KTP	3258901108930008
		Upload KTP	
		Phone	0
		Pekerjaan	Karyawan Swasta
		Priority	High
Sales Source	CRM	Source Document	
Type Last Service	REG	Sales Date	
Date Last Service	04/30/2020	Type Unit	
Rekomendasi Service	Regular	Product	
KPB Ke		Engine No	D 5890 KZ - JFK1E1108328
KPB Date Expired			

A red box at the bottom right of the screenshot contains the text: **Data history pembelian tidak terisi**.

Leads Odoo CRM System

Gambar dibawah ini, **jika customer melakukan pembelian** dari Daya Motor.

The screenshot displays the Odoo CRM interface for a lead record. The browser address bar shows the URL: `odm.daya-motor.com/web?#id=139891&view_type=form&model=crm.lead&menu_id=1294&action=1408`. The interface includes a navigation menu on the left with options like 'Welcome Leads', 'Leads', 'Opportunities', 'Import CRM', 'Leads WOR', 'Opportunities WOR', 'Report', and 'Report CRM'. The main content area shows the lead details for 'LDS/SAM01/2007/01990'. The data is organized into two columns of fields.

Field	Value	Field	Value
Branch	[SAM01] SAMARINDA	Contact Name	RESTU ANDIKA PRADANA PUTRA .
Division	Workshop	Email	
Customer	[BPA/1912/1553856] RESTU ANDIKA PRADANA PUTRA	Instagram	
Address	JL.CIPTO MANGUNKUSUMO JL.CIPTO MANGUNKUSUMO [6400] KALIMANTAN TIMUR	Facebook	
Sales Source	Showroom	Twitter	
Type Last Service		No KTP	6472020504010003
Date Last Service		Upload KTP	
Rekomendasi Service	KPB	Phone	085845164510
KPB Ke	3	Pekerjaan	Mahasiswa/Pelajar
KPB Date Expired	07/31/2020	Priority	High
		Source Document	
		Sales Date	12/04/2019
		Type Unit	X1H02N35S2 A/T PLUS [New Vario Techno Plus]
		Product	X1H02N35S2 A/T PLUS (BL-BLUE)
		Engine No	KT 2146 FK - KF41E1693525

Data history pembelian terisi secara otomatis

Leads Odoo CRM System

Jika data customer belum memiliki CDDB di Odoo, maka cabang melengkapi CDDB tersebut dengan mengklik **tanda panah disamping field customer**, lalu cabang akan diarahkan ke halaman customer atau **halaman untuk pembuatan BPA**. Mohon diperhatikan untuk pengisian cabang tidak akan bisa mengisi lagi data pada tab **taxes** dikarenakan **validasi data tax** oleh IT dan Departemen Pajak di HO.

The screenshot displays the Odoo CRM interface. A warning dialog box is open in the center, titled "Odoo Warning". The dialog contains a warning icon and the following text: "Warning! PARTNER BELUM MEMILIKI CDDB, SILAHKAN LENGKAPI CDDB TERLEBIH DAHULU, SILAHKAN KLIK TOMBOL DI SEBELAH CUSTOMER". Below the dialog, the "Leads WOR" form is visible. The "Customer" field is set to "[BPA/2004/1718729] H BAIIDILLAH". A red box highlights a dropdown arrow and a document icon next to the customer name, with a red arrow pointing to it. The form also shows fields for Branch, Division, Address, Contact Name, Email, Instagram, Facebook, Twitter, No KTP, Upload KTP, Phone, Pekerjaan, and Priority.

Leads Odoo CRM System

Jika cabang **mengganti alamat, no ktp, no hp, customer pada halaman Leads**, maka data juga akan **berubah di master customer**. Customer baru yang diinput di Leads juga dapat digunakan di transaksi lain karena **data customer sudah tersimpan di system**.

Mobile: 085294233849

Company: [Dropdown]

Tags: [Dropdown]

★ 1 Opportunities	📅 0 Meetings	📞 0 Calls
📄 14,428,183.00 Invoiced	🚲 1 Unit	🛠️ 6 Service
		🔧 0 Sparepart

Address: JL. TIRTA AYU, 08 03, [3200] JAWA B, [3212] KAB, [321214] B, BALONGAN, [45217] BALON, BALONGAN

Job Position: e.g. Sales Director

Phone: [Field]

Fax: [Field]

Email: [Field]

Partner Code: BPA/1905/1251871

Branch: [IND01] INDRAMAYU

Website: e.g. www.odoo.com

Tipe Partner: Pihak Ke 3

Principle:

Biro Jasa:

Kas Negara:

Forwarder:

General Supplier:

Creditor / Debitur:

Showroom:

Ahass:

Dealer:

Finance Company:

Insurance Company:

Customer:

Direct Customer:

Group Customer:

Branch (Boolean):

Leads Odoo CRM System

- Berikut adalah field yang berwarna biru yang wajib diisi.

... Messaging Showroom Workshop Sales **Leads** Master Accounting Purchases Warehouse Human Resources Website Settings

ANDRI PERMANA (PT. D...)

DAYA Motor **HONDA**

Leads WOR / LDS/SAM01/2007/01990

Save or Discard 2 / 80

Branch	[SAM01] SAMARINDA	Contact Name	RESTU ANDIKA PRADA
Division	Workshop	Email	
Customer	[BPA/1912/1553856] RESTU ANDIKA PRADANA	Instagram	
Address	JL.CIPTO MANGUNKUSUMO	Facebook	
	JL.CIPTO MANGUNKUSUMO	Twitter	
	City [6400] KA ZIP	No KTP	6472020504010003
	Country	Upload KTP	Select Save As Clear
		Phone	085845164510
		Pekerjaan	Mahasiswa/Pelajar
		Priority	High
Sales Source	CRM	Source Document	
Type Last Service		Sales Date	12/04/2019
Date Last Service		Type Unit	X1H02N35S2 A/T PLUS [New Vario Techno 150 Plus]
Rekomendasi Service	KPB	Product	X1H02N35S2 A/T PLUS (BL-BLUE)
KPB Ke	3	Engine No	KT 2146 FK - KF41E1693525
KPB Date Expired	07/31/2020		

Powered by Odoo



Ini merupakan informasi mengenai rekomendasi type service dan history service terakhir di daya motor

Leads Odoo CRM System

Field **Pekerjaan** wajib diisi

Leads WOR / LDS/SAM01/2007/01990

Save or Discard

LDS/SAM01/2007/01990

Branch: [SAM01] SAMARINDA

Division: Workshop

Customer: [BPA/1912/1553856] RESTU ANDIKA PRADANA

Address: JL.CIPTO MANGUNKUSUMO

City: [6400] KA ZIP: Country:

Contact Name: RESTU ANDIKA PRADA

Email: Instagram: Facebook: Twitter: No KTP: Upload KTP: Phone: Pekerjaan: Priority: High

Sales Source: CRM

Type Last Service: Date Last Service: Rekomendasi Service: KPB

Source Document: Sales Date: Type Unit: Product: X1H02N35S2 A/T PLUS [New Vario Techno 150 Plus]

2 / 80

Service

Pegawai Negeri
Karyawan Swasta
Ojek
Wiraswasta/Pedagang
Mahasiswa/Pelajar
Guru/Dosen
TNI/Polri

Search More...
Mahasiswa/Pelajar

12/04/2019

X1H02N35S2 A/T PLUS [New Vario Techno 150 Plus]

X1H02N35S2 A/T PLUS (BL-BLUE)

CONVERT TO OPPORTUNITY

Tombol *convert to opportunity* akan muncul ketika data Leads sudah terisi lengkap dan di save.

a. Akan muncul pop up seperti tampilan dibawah ini, klik langsung *Create Opportunity*.

The screenshot displays the Odoo CRM interface. A pop-up window titled "Convert to opportunity" is centered on the screen. The pop-up has a close button in the top right corner. Below the title, there is a "Convert to Opportunity" button with a tooltip that says "Convert to Opportunity Conversion Action". To the right of this button is a dropdown menu with "Convert to opportunity" selected, highlighted by a red box and a red arrow. Below the dropdown, there is a "Related Customer" field with the value "[BPA/1912/1553856] RESTU ANDIKA PRADANA PUTRA". At the bottom of the pop-up, there is a yellow "Create Opportunity" button and a "Cancel" button.

The background interface shows a lead record for "RESTU ANDIKA PRADANA PUTRA". The record includes the following details:

Division	Workshop	Email	
Customer	[BPA/1912/1553856] RESTU ANDIKA PRADANA PUTRA	Instagram	
Address	JL.CIPTO MANGUNKUSUMO [6400] KALIMANTAN TIMUR	Facebook	
Sales Source	CRM	Twitter	
		No KTP	6472020504010003
		Upload KTP	
		Phone	085845164510
		Pekerjaan	Mahasiswa/Pelajar
		Priority	High
		Source Document	

CONVERT TO OPPORTUNITY

Setelah opportunity terbentuk, **status opportunity (di kanan atas)** adalah **new**, akan muncul halaman seperti dibawah ini, :

The screenshot displays the Odoo CRM interface for a new opportunity. The browser address bar shows the URL: `odm.daya-motor.com/web?id=139891&view_type=form&model=crm.lead&menu_id=1295&action=1409`. The top navigation bar includes 'Messaging', 'Showroom', 'Workshop', 'Sales', 'Leads', 'Master', 'Accounting', 'Purchases', 'Warehouse', 'Human Resources', 'Website', and 'Settings'. The user is logged in as 'ANDRI PERMANA (PT. D...)'.

The main header area shows 'Opportunities... / LDS/SAM01/2007/01990' with an 'Edit' button and 'Attachment(s)' and 'More' dropdowns. Below this, there are three buttons: 'Mark as Won', 'Mark as Lost', and 'Follow Up 1', which are highlighted with a red box and a red arrow. To the right, there is a 'New' button, also highlighted with a red box.

The main content area displays the details for the opportunity 'LDS/SAM01/2007/01990'. The left sidebar shows the navigation menu with 'Opportunities WOR' selected. The right sidebar shows 'Schedule/Log Calls' and '0 Meetings'.

Branch	[SAM01] SAMARINDA	Source Document	
Division	Workshop	Priority	High
Customer	[BPA/1912/1553856] RESTU ANDIKA PRADANA PUTRA	Opportunity Status	
Email		Engine No	KT 2146 FK - KF41E1693525
Instagram			
Facebook			
Twitter			
Phone	085845164510		
No KTP	6472020504010003		
Pekerjaan	Mahasiswa/Pelajar		
Sales Source	CRM		
Type Last Service			
Date Last Service			
Rekomendasi Service	KPB		
KPR Ka	3		

CONVERT TO OPPORTUNITY

Ketika sudah mengklik tombol follow 1, **status opportunity (di kanan atas)** adalah **follow up 1** dan data yang harus diisi adalah **Tanggal melakukan Follow Up 1, Opportunity Status, Status Customer**. Selain filed-field tersebut, semua data Leads sudah tidak dapat dirubah kembali.

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odm.daya-motor.com/web?#id=113068&view_type=form&model=crm.lead&menu_id=1295&action=1409

Messaging Showroom Workshop Sales Leads Master Accounting Purchases Warehouse Human Resources Website Settings

DAYA Motor HONDA

Opportunities... / LDS/A-BAN08/2007/00320

Save or Discard

1 / 80

Follow Up 1

Mark as Won Mark as Lost Follow Up 2

Subject: LDS/A-BAN08/2007/00320

Branch: [A-BAN08] A TANJUNG LAYA

Division: Workshop

Customer: [BPA/2004/1720629] M. KOSIM

Source Document

Priority: High

Follow Up 1

Next Plan Follow Up 2

Opportunity Status: COLD PROSPECT

Status Customer

Note

Phone: 0

No KTP: 0

Pekerjaan: Karyawan Swasta

Sales Source: CRM

Type Last Service: REG

Engine No: D 3468 VBW - JBP1E1240089

Schedule/Log Calls

0 Meetings

Opportunities WOR

Terhubung

Tidak Terhubung

Rejected

CONVERT TO OPPORTUNITY

Setelah tombol **Follow Up 1** di klik maka status opportunity (di sebelah kanan atas) akan berubah menjadi Follow Up 1 data yang bisa diedit adalah **Follow Up 1** (tanggal dilakukannya follow up 1 dan wajib diisi), **Next plan follow up 2** (Rencana follow up 2) , **Expected Closing**, **Opportunity status**, **Type motor**, **Warna motor**, **Cash/credit**, dan ada penambahan field yaitu **Status customer**.

Leads - Odoo | GLPI - Tickets | Opportunity - Odoo

Not secure | 192.168.3.59:8396/web?#id=29131&view_type=form&model=crm.lead&active_id=1344

*** Messaging Showroom STNK BPKB Workshop Finance Taxes Sales General Affair **Leads** Master Advance Setting API Payroll Accounting Purchases Warehouse Human Resources Knowledge Reporting Website Settings Administrator (PT. Dava ...

DAYA Motor HONDA

Leads / LDS/BAN04/2005/00191

Save or Discard

Mark as Won Mark as Lost Follow Up 2

Follow Up 1

Subject
LDS/BAN04/2005/00191

Schedule/Log Calls 0 Meetings

Branch [BAN04] SOEKARNO HATTA

Customer [BPA/1804/089339] HENDRA BUDIANA (DM HO) (10100092)

Source Document

Priority

Follow Up 1

Next Plan Follow Up 2

Expected Closing

Opportunity Status

Note

Type

Color Varian

Order In / Leads Prospect

Cash / Credit

Status Customer

High

05/31/2020

HOT PROSPECT

Note...

Internal Notes Lead Fund Raising

Send a message or Log an internal note

Following

One follower Add others

Administrator

Powered by Odoo

2:39 PM 5/15/2020

CONVERT TO OPPORTUNITY

Field rekomendasi waktu **next plan follow up 2** akan terisi otomatis **H+7** dari actual waktu **Follow up 1**, jika cabang akan melakukan **follow up 2**. seperti dibawah ini:

The screenshot shows the Odoo CRM interface for an Opportunity record. The record ID is LDS/A-BAN08/2007/00320. The 'Next Plan Follow Up 2' date is highlighted in red and set to 07/18/2020, which is 7 days after the 'Follow Up 1' date of 07/11/2020. A red arrow points to the date field.

Field	Value
Subject	LDS/A-BAN08/2007/00320
Branch	[A-BAN08] A TANJUNG LAYA
Division	Workshop
Customer	[BPA/2004/1720629] M. KOSIM
Source Document	
Priority	High
Follow Up 1	07/11/2020
Next Plan Follow Up 2	07/18/2020
Opportunity Status	COLD PROSPECT
Status Customer	Terhubung
Note	

CONVERT TO OPPORTUNITY

Jika cabang akan langsung menjadikan **Leads tersebut menjadi Won**, maka itu dapat dilakukan. Jika cabang akan menjadikan **Leads tersebut menjadi Lost**, maka akan muncul sebuah **pop up yang harus diisi oleh cabang**, seperti dibawah ini:

The screenshot shows the Odoo CRM interface for a lead. A pop-up window titled "Make Leads Lost" is open, allowing the user to mark a lead as lost. The pop-up contains a "Reason" text area (highlighted with a red box) and a "Lead id" dropdown menu (also highlighted with a red box) showing "LDS/MAN01/2007/01297". At the bottom of the pop-up, there are "Make it Lost" and "Cancel" buttons. In the background, the lead details are visible, including contact information, sales source, and service history. A red arrow points to the "Follow Up 1" button in the background interface.

Email		Next Plan Follow Up 2	07/18/2020
Instagram		Opportunity Status	MEDIUM PROSPECT
Facebook		Status Customer	Terhubung
Twitter		Note	
Phone	082396490109	Engine No	DB 2861 HJ - JM31E3002974
No KTP	7108060112910001		
Pekerjaan	Wiraswasta/Pedagang		
Sales Source	Leads		
Type Last Service			
Date Last Service			
Rekomendasi Service	KPB		
KPB Ke	3		
KPB Date Expired	07/31/2020		

CONVERT TO OPPORTUNITY

Setelah tombol **Follow Up 2** di klik maka akan muncul tampilan seperti dibawah ini:

The screenshot shows the Odoo CRM interface for a lead with ID LDS/SUM01/2007/01060. The top navigation bar includes 'Leads' (selected), 'Master', 'Accounting', 'Purchases', 'Warehouse', 'Human Resources', and 'Website Settings'. The left sidebar contains 'Welcome', 'Leads', 'Opportunities', 'Import CRM', 'Leads WOR', 'Opportunities WOR', 'Report', and 'Report CRM'. The main content area displays the lead details and a follow-up schedule table.

Field	Value
Branch	[SUM01] JATINANGOR
Division	Workshop
Customer	[BPA/2005/1741316] MUHAMMAD HANIF RIZKI PRADANA
Email	
Instagram	
Facebook	
Twitter	
Phone	082126574244
No KTP	3204070805960001
Pekerjaan	Mahasiswa/Pelajar
Sales Source	CRM
Type Last Service	
Date Last Service	
Rekomendasi Service	KPB

Field	Value
Source Document	
Priority	High
Follow Up 1	07/11/2020
Next Plan Follow Up 2	07/18/2020
Follow Up 2	07/18/2020
Next Plan Follow Up 3	07/25/2020
Opportunity Status	COLD PROSPECT
Status Customer	Terhubung
Note	
Engine No	D 6637 VEO - KF51E1047781

CONVERT TO OPPORTUNITY

Setelah tombol **Follow Up 3** di klik maka akan muncul tampilan seperti dibawah ini:

The screenshot displays the Odoo CRM interface for a lead record. The top navigation bar includes 'Messaging', 'Showroom', 'Workshop', 'Sales', 'Leads', 'Master', 'Accounting', 'Purchases', 'Warehouse', 'Human Resources', and 'Website Settings'. The main content area shows the lead details for 'LDS/SUM01/2007/01060'. The 'Mark as Won' and 'Mark as Lost' buttons are highlighted with a red box. The 'Follow Up 3' button is also highlighted with a red box. The lead details include:

Field	Value
Branch	[SUM01] JATINANGOR
Division	Workshop
Customer	[BPA/2005/1741316] MUHAMMAD HANIF RIZQI PRADANA
Email	
Instagram	
Facebook	
Twitter	
Phone	082126574244
No KTP	3204070805960001
Pekerjaan	Mahasiswa/Pelajar
Sales Source	CRM
Type Last Service	
Date Last Service	
Rekomendasi Service	KPB

The right side of the interface shows the 'Follow Up' schedule and 'Opportunity Status'.

Follow Up	Date
Follow Up 1	07/11/2020
Next Plan Follow Up 2	07/18/2020
Follow Up 2	07/18/2020
Next Plan Follow Up 3	07/25/2020

Opportunity Status: COLD PROSPECT
Status Customer: Terhubung
Engine No: D 6637 VEO - KF51E1047781

CONVERT TO OPPORTUNITY



- ❑ Setelah tombol Follow Up 3 di klik maka status opportunity (di sebelah kanan atas) akan berubah menjadi Follow Up 3 data yang bisa diedit adalah ***Follow Up 3*** (tanggal dilakukannya follow up 3 dan wajib diisi), ***Opportunity status, Status Customer***. Sementara ***field Follow Up 1, Next Plan Follow Up 2, Follow up 2, Next Plan follow up 3*** sudah tidak bisa dirubah kembali. Pada tahap ini, opportunity yang sudah terbentuk akan menjadi ***won*** atau ***lost***. Jika ***Lost*** artinya ***opportunity*** tidak dapat dilanjutkan kembali, tetapi Jika ***opportunity won*** akan muncul tombol ***Create Booking Service*** dan status ***opportunity*** (dikanan atas) akan menajdi ***Won***.

OPPORTUNITY TO WON

Jika **Opportunity Won**, semua data sudah tidak dapat dirubah kembali.

The screenshot displays the Odoo CRM interface for a lead record. The browser address bar shows the URL: `odm.daya-motor.com/web?id=73843&view_type=form&model=crm.lead&menu_id=1295&action=1409`. The navigation menu includes: Messaging, Showroom, Workshop, Sales, Leads, Master, Accounting, Purchases, Warehouse, Human Resources, Website, Settings. The user is logged in as ANDRI PERMANA (PT. D...).

The lead record details are as follows:

LDS/BEN01/2007/00424			
Branch	[BEN01] BENGKULU	Source Document	
Division	Workshop	Priority	High
Customer	[BPA/2003/1687405] FENTI ZUMARNI	Follow Up 1	
Email		Next Plan Follow Up 2	
Instagram		Follow Up 2	
Facebook		Next Plan Follow Up 3	
Twitter		Follow Up 3	
Phone	085268550800	Opportunity Status	COLD PROSPECT
No KTP	1771035102780004	Status Customer	
Pekerjaan	Karyawan Swasta	Note	
Sales Source	Showroom	Engine No	BD 2035 ID - JM81E1056206
Type Last Service	KPB 1		
Date Last Service	05/19/2020		
Rekomendasi Service	KPB		
KPB Ke	2		
KPB Date Expired	07/15/2020		

Buttons: Edit, Attachment(s), More, 13 / 125, Create Booking Service, Won.

Text box: Semua data yang terisi sudah tidak bisa dirubah kembali

CREATE DEALER MEMO

Ketika tombol **Create Booking Service** di klik akan muncul tampilan seperti dibawah ini:

odm.dayamotor.com/web?#id=73843&view_type=form&model=crm.lead&menu_id=1295&action=1409

Messaging Showroom Workshop Sales Leads Master Accounting Purchases Warehouse Human Resources Website Settings

DAYA Motor HONDA

Welcome
Welcome Leads

Leads
Leads
Opportunities
Import CRM
Leads WOR
Opportunities WOR

Report
Report CRM

Create Booking Service

Booking Date	07/10/2020	No. Mesin	BD 2035 ID - JM81E105620
Jam Service	Jam <input type="text"/> Minit <input type="text"/>	Type Service	KPB
Branch	[BEN01] BENGKULU	KPB Ke	2
From Lead?	<input checked="" type="checkbox"/>	Alasan ke AHASS	Telp Reminder
Nama Customer	[BPA/2003/1687405] FENTI ZU	Keluhan	
Mobile	085268550800	Hubungan Pembawa & Pemilik	
		Pit	
		Mechanic	
		Service Advisor	

or

Pekerjaan	Karyawan Swasta	Opportunity Status	COLD PROSPECT
Sales Source	Showroom	Status Customer	
Type Last Service	KPB 1	Note	
Date Last Service	05/19/2020	Engine No	BD 2035 ID - JM81E1056206
Rekomendasi Service	KPB		
KPB Ke	2		
KPB Date Expired	07/15/2020		

Powered by Odoo

10:58 AM 7/11/2020

CREATE DEALER MEMO

Cabang harus mengisi **field yang berwarna biru** sesuai dengan permintaan konsumen pada saat akan datang service dan meminta dibuatkan jadwal booking servicenya.

The screenshot shows the 'Create Booking Service' form in the Odoo CRM system. The form is highlighted with a red border. The form contains the following fields:

- Booking Date: 07/10/2020
- Jam Service: 09 : 30
- Branch: [BEN01] BENGKULU
- From Lead?:
- Nama Customer: [BPA/2003/1687405] FENTI ZU
- Mobile: 085268550800
- No. Mesin: BD 2035 ID - JM81E105620
- Type Service: KPb
- KPb Ke: 2
- Alasan ke AHASS: Telp Reminder
- Keluhan: rem kurang pakem
- Hubungan Pembawa & Pemilik: Sendiri
- Pit: PIT 3
- Mechanic: [18060009] JEPRI ARI SAPUTF
- Service Advisor: [13020048] HENDRI STIAWAN

At the bottom of the form, there are buttons for 'Process' and 'Close'. A red arrow points to the 'Pit' field.

Pekerjaan	Karyawan Swasta	Status Customer	COED PROSPECT
Sales Source	Showroom	Note	
Type Last Service	KPB 1	Engine No	BD 2035 ID - JM81E1056206
Date Last Service	05/19/2020		
Rekomendasi Service	KPB		
KPB Ke	2		
KPB Date Expired	07/15/2020		

CREATE DEALER MEMO

Untuk membentuk **Booking Service**, klik **Process**.

... Messaging Showroom Workshop Sales Leads Master Accounting Purchases Warehouse Human Resources Website Settings

DANA ANDRI PERMANA (PT. D...)

DAYA Motor HONDA

Booking Servi... / BOS-W/MAN01/2007/00001

Edit Create Attachment(s) More 4 / 4 Draft Posted

Booking Service
BOS-W/MAN01/2007/00001

Booking Date	07/10/2020	Type Service	KPB 2
Jam Service	11 30	Alasan ke AHASS	Telp Reminder
Branch	[MAN01] MANADO	Keluhan	SERVICE BIASANYA SESUAI KETENTUAN KPB
From Lead?	<input checked="" type="checkbox"/>	Hubungan Pembawa & Pemilik	Sendiri
No. Lead	LDS/MAN01/2007/01219	Pit	2
Nama Customer	[BPA/2003/1688763] SULTJE ADOLONG (1777809)	Mechanic	[18100091] DION IMANUELLY LABESI
Mobile	082187479254	Service Advisor	[14080052] JHOFRI BILLI TUMEWAN
No. Mesin	DB 4042 BW - JM82E1033045		

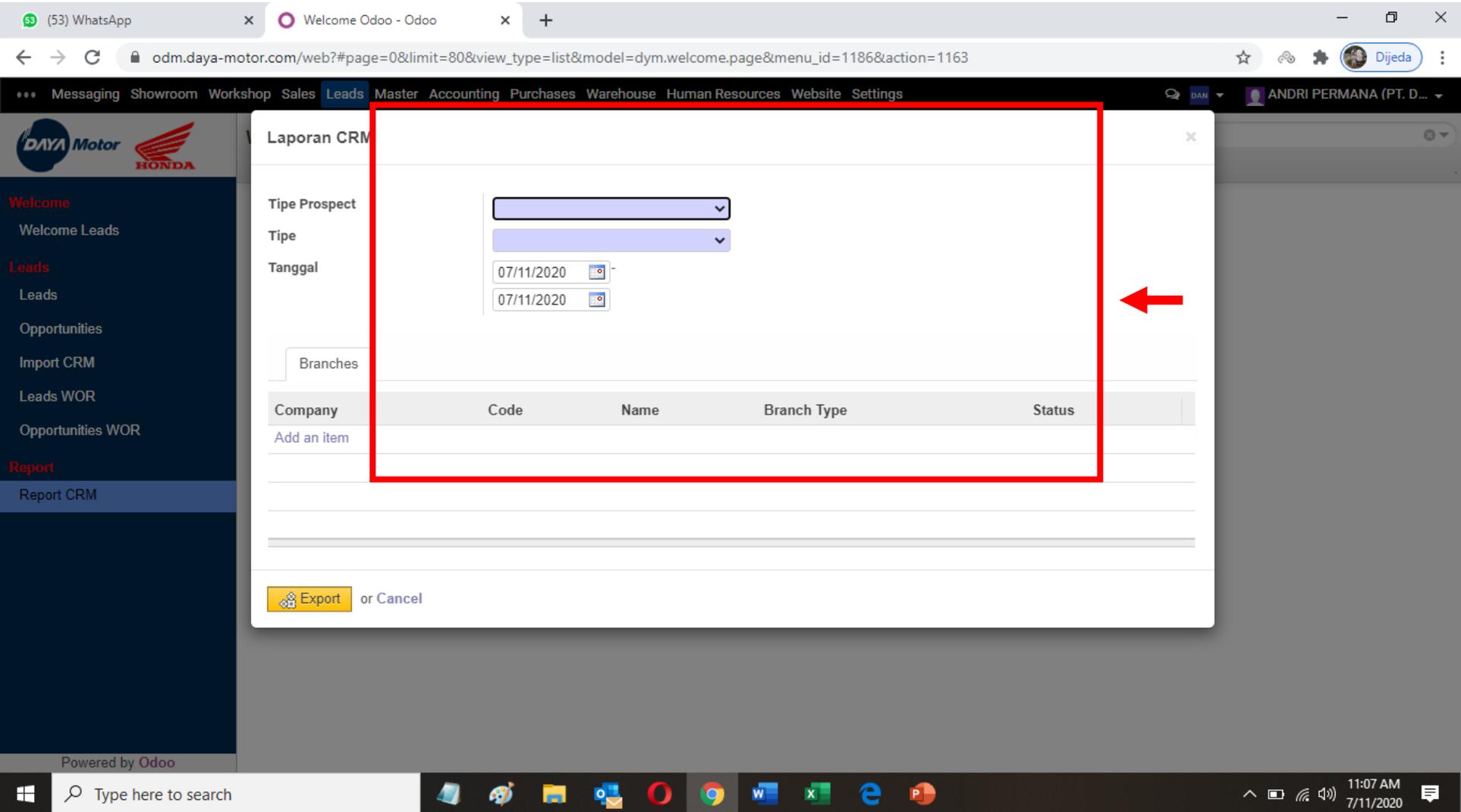
Audit Trails

Created by	CRM MANADO	Last Updated by	CRM MANADO
Created on	07/11/2020 10:08:17	Last Updated on	07/11/2020 10:08:17

Setelah terbentuk **Booking Service**, maka akan dilanjutkan prosesnya oleh **Admin Bengkel untuk mengklik tombol posted dan akan muncul 2 pilihan (cancel booking / create WO)**.

EKSPORT REPORT

Menu report CRM ada di man menu *Leads->Report*. Tampilannya seperti gambar dibawah ini:



The screenshot shows a web browser window displaying the Odoo CRM interface. The browser's address bar shows the URL: `odm.dayamotor.com/web/?#page=0&limit=80&view_type=list&model=dym.welcome.page&menu_id=1186&action=1163`. The top navigation bar includes menus like Messaging, Showroom, Workshop, Sales, Leads, Master, Accounting, Purchases, Warehouse, Human Resources, and Website Settings. The left sidebar contains a navigation menu with options like Welcome, Leads, Opportunities, Import CRM, Leads WOR, Opportunities WOR, Report, and Report CRM. The main content area displays a modal window titled "Laporan CRM" (CRM Report). This modal contains a form with the following fields: "Type Prospect" (dropdown), "Type" (dropdown), and "Tanggal" (date range) with values "07/11/2020" to "07/11/2020". Below the form is a table with columns: "Company", "Code", "Name", "Branch Type", and "Status". At the bottom of the modal, there is an "Export" button and a "Cancel" option. A red arrow points to the right side of the modal window.

odm.dayamotor.com/web/?#page=0&limit=80&view_type=list&model=dym.welcome.page&menu_id=1186&action=1163

Messaging Showroom Workshop Sales Leads Master Accounting Purchases Warehouse Human Resources Website Settings

DAYA Motor HONDA

Welcome
Welcome Leads

Leads
Leads
Opportunities
Import CRM
Leads WOR
Opportunities WOR

Report
Report CRM

Powered by Odoo

11:07 AM
7/11/2020

EKSPORT REPORT

Type Prospect H23 dan untuk Type **All, Leads** atau **Opportunity**. Jika memilih **All** maka data **leads** dan **opportunity** akan **tergenerate** secara keseluruhan berdasarkan tanggal yang dipilih, Jika memilih **Leads** atau **Opportunity**, maka data yang akan tergenerate pada **report hanya leads atau opportunity saja**.

Messaging Showroom Workshop Sales **Leads** Master Accounting Purchases Warehouse Human Resources Website Settings

ANDRI PERMANA (PT. D...)

Laporan CRM

Type Prospect: H23

Type: **All**, Leads, Opportunity

Tanggal:

Branches:

Company	Code	Name	Branch Type	Status
Add an item				

Export or Cancel

EKSPORT REPORT

Jika memilih **Opportunity**, maka akan muncul field baru yaitu stage. **Stage** dalam kata lain adalah **status Opportunity**. Report bisa di generate per status Opportunity.

... Messaging Showroom Workshop Sales Leads Master Accounting Purchases Warehouse Human Resources Website Settings

ANDRI PERMANA (PT. D...)

Laporan CRM

Type Prospect H23

Type Opportunity

Stage

Tanggal

Branches

All
Follow Up 1
Follow Up 2
Follow Up 3
Won
Lost

Company	Code	Name	Branch Type	Status
Add an item				

Export or Cancel

Powered by Odoo

Type here to search

11:10 AM
7/11/2020

EKSPORT REPORT

Tanggal. Tanggal yang di isi disini adalah periode penginputan leads, dapat perhari atau perbulan. Data yang akan degenerate di report didasarkan pada **periode yang diinputkan dan kode cabang**.

odm.dayamotor.com/web?#page=0&limit=80&view_type=list&model=dym.welcome.page&menu_id=1186&action=1163

Messaging Showroom Workshop Sales Leads Master Accounting Purchases Warehouse Human Resources Website Settings

DAYA Motor HONDA

Welcome
Welcome Leads
Leads
Leads
Opportunities
Import CRM
Leads WOR
Opportunities WOR
Report
Report CRM

Laporan CRM

Tipe Prospect: H23
Tipe: All
Tanggal: 07/11/2020

Company	Code	Name	Branch Type	Status
Add an item				

Export or Cancel

Lalu klik export.



Jerima Kasih