



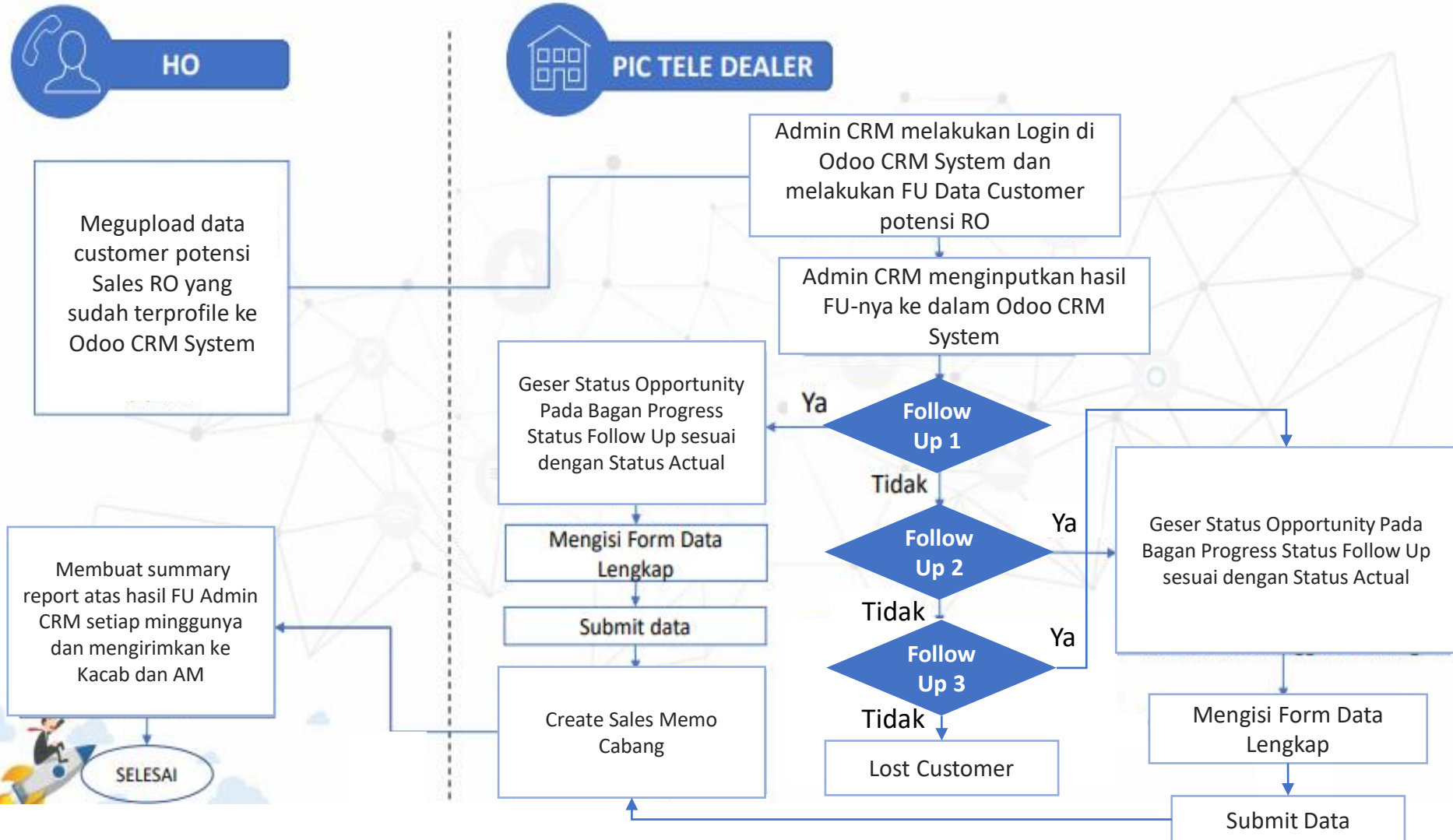
odoo

CRM Odoo Daya Motor



# Flow Process CRM H1 Odoo CRM System

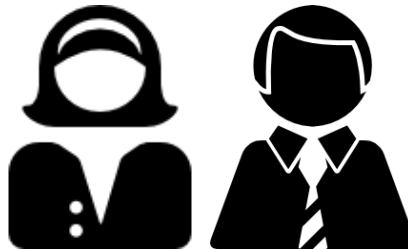
## Flow Proses Dealer



# Pihak yang terlibat dalam proses follow up



**PIC CRM**



**Sales Force**



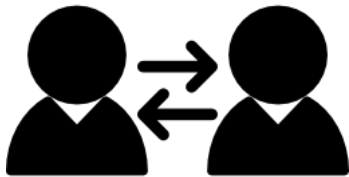
**Admin H1**



# 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 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 penjualan

3



Memastikan dealer mendownload database konsumen di Odoo CRM System

4



Buat SOP & SLA untuk follow up penjualan

5





Tarik report secara berkala untuk monitoring status follow up

# FOLLOW UP 1<sup>st</sup> CALL



**Asumsi: Pembelian dilakukan tanggal 20 Mei 2020**

PIC	Aktivitas	Waktu
 <b>Admin H1</b>	Lakukan 1 <sup>st</sup> Call untuk : -mengucapkan terima kasih, -verifikasi data, -pemberitahuan kapan KPB 1, dan -informasi jika ada keluhan atau pertanyaan seputar layanan Honda dapat menghubungi nomor Dealer atau berkunjung ke Dealer.  Mengisi form rekapan FU 1 <sup>st</sup> call	Setiap hari (max H+5)  <b>Contoh :</b> 20 Mei (H+5)
 <b>Admin H1</b>	Informasikan STNK telah jadi dan dapat diambil di dealer (Untuk Premium Customer ditelepon, untuk Customer reguler dikirimkan SMS)  Perbarui No. HP pelanggan yang tidak tersedia disystem Odoo dan di Faktur Online	Setiap STNK jadi (mayoritas H+14 setelah pembelian)  <b>Contoh :</b> 20 Mei 2019 (H+14)

# TUJUAN 1<sup>ST</sup> CALL



Engagement Dealer kepada konsumen dengan mengucapkan terima kasih telah melakukan pembelian SMH by call sehingga konsumen mengenal Dealer



Mengingatkan konsumen untuk servis gratis pertama di AHASS tempat pembelian sepeda motor Honda

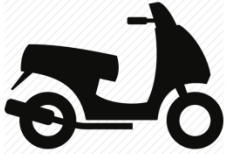


Memastikan data yang diberikan konsumen 3C (Clean, Complete, Correct) dengan cara verifikasi



Menginformasikan no telp Dealer yang dapat dihubungi dan mengundang ke Dealer jika konsumen mempunyai keluhan atau pertanyaan berkaitan dengan layanan Honda

# KETENTUAN 1<sup>ST</sup> CALL



Didata untuk semua pembeli motor.



Dilakukan setelah motor diterima oleh konsumen.



Dilakukan setiap hari setelah motor dikirim ke konsumen, max 5 hari kerja.




Status diisi apakah konsumen dapat dihubungi atau tidak, apabila tidak wajib dihubungi di lain waktu (max 3x).



# FOLLOW UP SMS KPB 1




**Asumsi: Pembelian dilakukan tanggal 20 Mei 2020**

PIC	Aktivitas	Waktu
 Admin H1	Melakukan SMS untuk mengundang service KPB 1 ke AHASS  Mengisi form rekapan SMS KPB 1	20 Mei 2020 (H+30)


# FOLLOW UP PENJUALAN (1<sup>st</sup> ATTENTION)



PIC	AKTIVITAS		Waktu
	H1-H1	H2-H1	
 Sales Force (sales counter/salesman)	Telepon / SMS untuk menjaga hubungan dengan pelanggan yang motornya berumur 2 tahun ke atas (menyapa, informasi, promosi, reminder, survey, dll) b	Mengisi hasil follow up 1 <sup>st</sup> attention di Odoo CRM System	Setiap Hari

# FOLLOW UP PENJUALAN (1<sup>st</sup> FOLLOW UP)



PIC	AKTIVITAS		Waktu
	H1-H1	H2-H1	
 Sales Force (sales counter/salesman)	Menelepon tawarkan sepeda motor dari hasil analisa database pelanggan dealer (H1) dan database pelanggan AHASS (H2) yang ada di Odoo CRM System	Mengisi hasil follow up 1 <sup>st</sup> attention di Odoo CRM System	Setiap Hari

# Leads Odoo CRM System



## Catatan Leads Odoo CRM System

☐ Ada 2 category leads yaitu :

1. **Order In** : leads yang berasal dari masing-masing cabang dan berstatus Order In (*prospect deal pembelian 90%*) dikarenakan konsumen sudah memiliki data lengkap (KTP, KK, No Telp, dll) sebagai persyaratan administrasi pengajuan credit kepada leasing dan sedang dalam proses pengajuan credit, **sudah memberikan DP atau booking unit** pembelian kepada cabang.
2. **Leads Prospect** : Leads yang **berasal dari HO dan cabang** namun masih diperlukan *aktivitas follow up CRM lebih lanjut* untuk ditawarkan agar dapat menjadi deal pembelian unit di cabang masing-masing.

☐ Status Prospect :

1. **HOT Prospect** : Leads yang memiliki potensi deal pembelian dalam **jangka waktu 1 - 10 Hari** kedepan (progress > 70% deal).
2. **MEDIUM Prospect** : Leads yang memiliki potensi deal pembelian dalam **jangka waktu 10 - 20 Hari** kedepan (progress 50% - 70% deal).
3. **LOW Prospect** : Leads yang memiliki potensi deal pembelian dalam **jangka waktu 20 - 30 Hari** kedepan (progress < 50% deal).

# Leads Odoo CRM System



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

1.

The screenshot displays the Odoo CRM 'Leads / New' form. The top navigation bar includes modules such as Messaging, Showroom, STNK BPKB, Workshop, Finance, Taxes, Sales, General Affair, Leads, Master, Advance Setting, API, Payroll, Accounting, Purchases, Warehouse, Human Resources, Knowledge, Reporting, and Website Settings. The left sidebar shows the 'Leads' menu item highlighted. The main form area contains the following fields:

- Subject
- Branch
- Customer
- Address (Street, City, State, ZIP, Country)
- Contact Name
- Email
- No KTP
- Phone
- Pekerjaan
- Priority
- Sales Source
- Sales Person
- Sales Team
- Type
- Warna
- Order In / Leads Prospect
- Source Document
- Sales Date
- Last Type
- Last Product
- Tenor
- Cash/Credit
- DP (0.00)

Buttons for 'Save or Discard', 'Convert to Opportunity', 'New', and 'More' are visible. A 'Schedule/Log Calls' button is also present in the top right corner.



# 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 terdapat dua kondisi**, yaitu data **customer sudah ada di Odoo dan data customer belum ada di Odoo**.

Jika data customer sudah ada di Odoo atau **sudah ada BPA atas nama tersebut**, maka cabang tinggal mengisi field customer dengan **kode BPA tersebut**, secara otomatis data customer akan terisi, seperti alamat, no KTP, no tlp, dan data pembelian sebelumnya yang pernah dilakukan customer tersebut. Perhatikan field Last type, sales date, last product, tenor, cash/credit dan DP, field field tersebut akan **otomatis terisi jika customer pernah melakukan pembelian sebelumnya**. Kemudian jika data no ktp dan no tlp **sudah ada**, maka **filed priority akan terisi otomatis dengan high**. Field sales person dan sales team akan **terisi berdasarkan data pembelian sebelumnya**, tetapi masih dapat **dirubah oleh cabang**, itu hanya data yang di *get* secara *default*.

# Leads Odoo CRM System

Gambar dibawah ini, **jika customer belum pernah melakukan pembelian** sebelumnya.

The screenshot displays the Odoo CRM interface for creating a new lead. The browser address bar shows the URL: `192.168.3.59:8396/web?#view_type=form&model=crm.lead&menu_id=1172&action=890`. The top navigation bar includes various modules like Messaging, Showroom, STNK BPKB, Workshop, Finance, Taxes, Sales, General Affairs, Leads, Master, Advance Setting, API, Payroll, Accounting, Purchases, Warehouse, Human Resources, Knowledge, Reporting, Website, and Settings. The 'Leads' menu item is highlighted with a red box, and a red arrow points to it. The sidebar on the left shows the 'Leads' menu item highlighted with a red box, and a red arrow points to it. The main form area is titled 'Leads / New' and contains the following fields:

- Subject
- Branch: [BAN04] SOEKARNO HATTA
- Customer: [BPA/1804/062108] YORDAN FIRMANSYAH YAMAN (DM HO) (1409091)
- Address: JL SOEKARNO HATTA
- City: [3200] JAWA BARA | ZIP
- Country
- Contact Name: YORDAN FIRMANSYAH | Title
- Email
- No KTP: 0
- Phone: 0
- Pekerjaan
- Priority: High
- Source Document
- Sales Date
- Last Type
- Last Product
- Tenor
- Cash/Credit
- DP: 0.00

A red box highlights the message: **Data history pembelian sebelumnya tidak terisi** (Previous purchase history is not filled).

# Leads Odoo CRM System

Gambar dibawah ini, jika customer **pernah melakukan pembelian sebelumnya.**

The screenshot displays the Odoo CRM interface for a lead entry. The browser address bar shows the URL: `192.168.3.59:8396/web?#view_type=form&model=crm.lead&menu_id=1172&action=890`. The top navigation bar includes various modules like Messaging, Showroom, STNK BPKB, Workshop, Finance, Taxes, Sales, General Affair, Leads, Master, Advance Setting, API, Payroll, Accounting, Purchases, Warehouse, Human Resources, Knowledge, Reporting, Website, and Settings. The user is logged in as Administrator (PT. Dava ...).

The main content area is titled "Leads / New" and features a "Convert to Opportunity" button. The lead form is populated with the following data:

Field	Value
Branch	[BAN04] SOEKARNO HATTA
Customer	[BPA/1804/089339] HENDRA BUDIANA (DM HO) (10100092)
Address	JL KACAPIRING
City	[3200] JAWA BARA
Country	Indonesia
Contact Name	HENDRA BUDIANA (DM)
Email	
No KTP	3273120805790011
Phone	08184867716
Pekerjaan	
Priority	High
Sales Source	
Sales Person	[07010004] SIGIT BUDI SANTOSO
Sales Team	ST-CIKAMPEK-015
Type	
Warna	
Order In / Leads Prospect	
Source Document	
Sales Date	04/29/2018
Last Type	E1F02N11S2 A/T [New Vario 125 CBS]
Last Product	E1F02N11S2 A/T (WR-WHITE RED)
Tenor	0
Cash/Credit	Tunai
DP	0.00

A red box highlights the purchase history data, with the text: "Data history pembelian terisi secara otomatis".

At the bottom of the page, there are "Internal Notes" and "Extra Info" tabs, and a large empty text area for notes.

# Leads Odoo CRM System

Jika data customer belum terdapat di Odoo, maka cabang harus mengetik nama konsumen tersebut pada field customer, lalu akan muncul pilihan *create and edit*, di klik *create and edit*, lalu cabang akan diarahkan ke halaman customer atau **halaman untuk pembuatan BPA baru**. Mohon diperhatikan untuk pengisian customer baru, **jika memilih hanya create**, maka cabang tidak akan bisa mengisi lagi **kelengkapan customer** seperti cddb, tax, dll pada form yang diakses melalui menu Leads ini.

The screenshot displays the Odoo CRM interface for creating a new lead. The browser address bar shows the URL: `192.168.3.99/web?#view_type=form&model=crm.lead&menu_id=1172&action=890`. The page title is "Leads / New". The left sidebar contains navigation options: "Welcome Leads", "Leads", "Opportunities", "Import CRM", "Report", and "Report CRM". The main form area includes fields for "Subject", "Branch" (set to "[BAND4] SOEKARNO HATTA"), "Customer" (with a dropdown menu open showing a list of customer names and a "Create and Edit..." button highlighted in red), "Address", "Sales Source", "Sales Person", "Sales Team", "Type", "Warna", and "Cash / Credit". The "Contact Name" field is empty, and the "Email" field contains "No KTP". The "Priority" dropdown is set to "Title". The "Source Document" field is empty. The "Sales Date", "Last Type", "Last Product", "Tenor", "Cash/Credit", and "DP" fields are also present. The "Internal Notes" and "Extra Info" tabs are visible at the bottom of the form. The system tray at the bottom shows the time as 9:23 PM on 3/26/2020.



# 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**.

The screenshot displays the Odoo CRM 'Create: Customer' form. The form is open in a browser window. The main form area shows fields for Name (linda), Mobile, Company, Address (GG SEKOLAH RTRW 007003), Job Position (e.g. Sales Director), Phone (0877-78719853), Fax, Email, Partner Code (BPA/), Branch, Website (e.g. www.odoo.com), and Type Partner. A summary table on the right shows 0 Opportunities, 0 Meetings, 0 Calls, 0.00 Invoiced, 0 Unit, 0 Service, 0 Sparepart, 0 Journal Items, and 0 Contracts. A list of checkboxes on the right includes options like Biro Jasa, Kas Negara, Forwarder, General Supplier, Creditor / Debitur, Showroom, Ahas, Dealer, Finance Company, Insurance Company, Customer (checked), Direct Customer, Group Customer, Branch (Boolean), Dealer Code, Customer Depo, and Member Number. The browser address bar shows '192.168.3.99/web?#view\_type=form&model=crm.lead&menu\_id=1172&action=890'. The system tray at the bottom shows the time as 9:25 PM on 3/26/2020.



# Leads Odoo CRM System

Pengisian field sales source, sales source yang dapat dipilih cabang adalah **showroom**, **pameran**, **pos**, **event** dan **leads**.

The screenshot shows the Odoo CRM interface for creating a new lead. The 'Sales Source' dropdown menu is open, displaying the following options: Showroom, POS, Event, Pameran, CRM, led, and Leads. A red box highlights this menu, and a red arrow points to the 'Internal Notes' field below it.

**Leads / New**

Save or Discard

Convert to Opportunity

Subject

Branch: [BAN04] SOEKARNO HATTA

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

Address: JL KACAPIRING

City: [3200] JAWA BARA ZIP

Country:

Contact Name: HENDRA BUDIANA (DM) Title

Email:

No KTP: 3273120805790011

Phone: 08104687716

Pekerjaan:

Priority: High

Source Document:

Sales Date: 04/29/2018

Last Type: E1F02N11S2 A/T [New Vario 125 CBS]

Last Product: E1F02N11S2 A/T (WR-WHITE RED)

Tenor: 0

Cash/Credit: Tunai

DP: 0.00

Sales Source: Showroom, POS, Event, Pameran, CRM, led, Leads, Search More...

Internal Notes

Extra Info

Powered by Odoo

2:16 PM 5/15/2020

# Leads Odoo CRM System

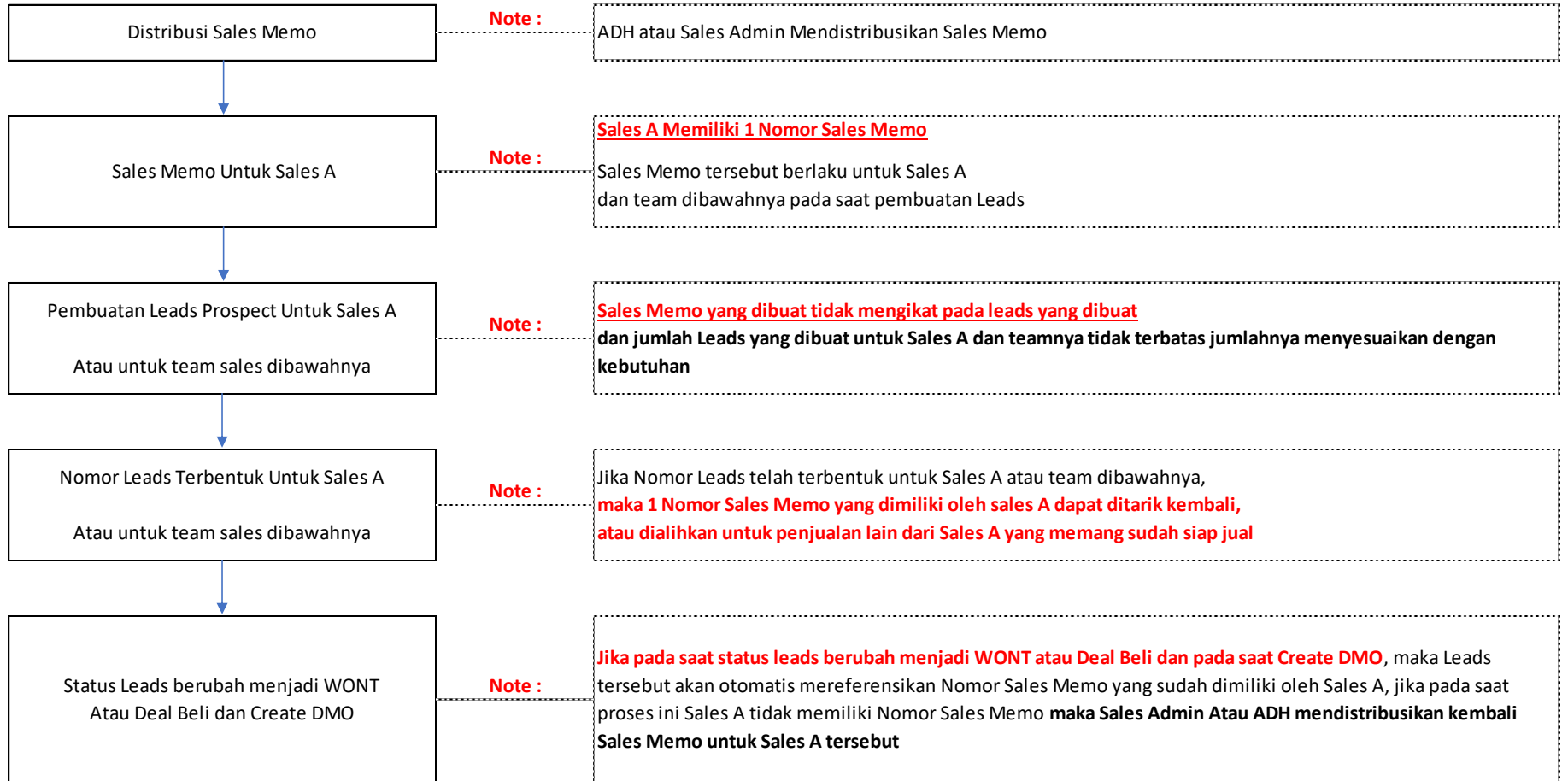
- Jika field **sales person diisi** maka secara **otomatis field sales team** juga akan terisi.
- Jika sales person belum dilakukan distribusi memo, maka akan keluar warning 'Distribusi Memo terlebih dahulu ....', Maka harus dilakukan distribusi memo terlebih dahulu.*

The screenshot displays the Odoo CRM interface for a lead entry. The 'Sales Person' field is highlighted with a red box, and a red arrow points to the 'Sales Team' field, which is also highlighted. The form includes the following fields:

- Subject
- Branch: [BAN04] SOEKARNO HATTA
- Customer: [BPA/1804/089339] HENDRA BUDIANA (DM HO) (10100092)
- Address: JL KACAPIRING, [3200] JAWA BARA, ZIP
- Contact Name: HENDRA BUDIANA (DM)
- Email: [Empty]
- No KTP: 3273120805790011
- Phone: 08164867716
- Pekerjaan: [Empty]
- Priority: High
- Sales Source: Showroom
- Sales Person: [MT-19070085] ADITYA RAMDAN
- Sales Team: ST-SOEKARNOHATTA014
- Sales Date: 04/29/2018
- Last Type: E1F02N11S2 A/T [New Vario 125 CBS]
- Last Product: E1F02N11S2 A/T (WR-WHITE RED)
- Tenor: 0
- Cash/Credit: Tunai
- DP: 0.00

Internal Notes and Extra Info fields are also visible at the bottom of the form.

# Juklak Distribusi Sales Memo Pada Saat Pembuatan Leads Odoo



## **Note :**

- Setiap Leads tidak harus didistribusikan 1 Nomor Sales Memo
- Policy mengenai penggunaan dan waktu Nomor Sales Memo ini mengikuti aturan Finance Dept
- Nomor Sales Memo tidak mengikat pada leads
- Nomor Sales Memo dapat ditarik kembali atau di alihkan untuk penjualan yang lain

# Leads Odoo CRM System

- Type diisi dengan **type motor yang dapat dipilih melalui dropdown**. Setelah type motor terisi, field warna akan menampilkan **pilihan warna yang ada di Odoo sesuai dengan type motor yang dipilih**.

The screenshot shows the Odoo CRM interface for creating a new lead. The 'Warna' (Color) field is highlighted with a red box, and a dropdown menu is open, showing the following options:

- WR-WHITE RED
- RA-RED WHITE
- WL-WHITE BLUE
- BR-BLACK RED
- Search More...

A red arrow points to the dropdown menu. The form also includes fields for Subject, Branch, Customer, Address, Contact Name, Email, No KTP, Phone, Pekerjaan, Priority, Sales Source, Sales Person, Sales Team, Last Type, Last Product, Tenor, Cash/Credit, and DP.

# Leads Odoo CRM System

- Field **Order In / Leads Prospect** harus diisi dengan cara dipilih

The screenshot shows the Odoo CRM interface for creating a new lead. The browser address bar indicates the URL: `192.168.3.99/web?#view_type=form&model=crm.lead&menu_id=1172&action=890`. The page title is "Leads / New". The form contains several sections:

- Subject:** A text field for the lead subject.
- Branch:** A dropdown menu.
- Customer:** A dropdown menu.
- Address:** Fields for Street, City, State, ZIP, and Country.
- Contact Information:** Fields for Contact Name, Email, No KTP, Phone, Pekerjaan, and Priority.
- Sales Information:** Fields for Sales Source, Sales Person, Sales Team, Type, and Warna.
- Order In / Leads Prospect:** A dropdown menu with two options: "Order In" and "Leads Prospect". This field is highlighted with a red box, and a red arrow points to it.
- Internal Notes / Extra Info:** A large text area for additional information.

The bottom of the screen shows the Windows taskbar with the system clock at 1:47 PM on 5/15/2020.



# Leads Odoo CRM System

Setelah filed Order In / Leads sudah dipilih, maka akan muncul field baru setelahnya yang juga wajib diisi, yaitu field **Cash / Credit**.

The screenshot shows the Odoo CRM interface for creating a new lead. The left sidebar contains navigation options: Welcome Leads, Leads, Opportunities (99+), Import CRM, Report, and Report CRM. The main form is titled 'Leads / New' and includes a 'Save' button and a 'Convert to Opportunity' button. The form fields are organized into two columns. The left column includes: Subject, Branch, Customer, Address (Street, City, State, ZIP, Country), Sales Source, Sales Person, Sales Team, Type, Warna, and Order In / Leads Prospect. The right column includes: Contact Name, Email, No KTP, Phone, Pekerjaan, Priority, Source Document, Sales Date, Last Type, Last Product, Tenor, Cash/Credit, and DP. The 'Order In / Leads Prospect' dropdown menu is highlighted with a red box, and a red arrow points to the 'Cash / Credit' field below it. The 'Cash / Credit' field is currently empty. The bottom of the screen shows the Windows taskbar with various application icons and the system tray displaying the time as 1:49 PM on 5/15/2020.

# Leads Odoo CRM System

Jika memilih **Cash**, maka tampilannya akan seperti dibawah ini

The screenshot displays the Odoo CRM 'Leads / New' form. The interface includes a top navigation bar with various modules like Messaging, Showroom, STNK/BPKB, Workshop, Finance, Taxes, Sales, General Affair, Leads, Master, Advance Setting, API, Payroll, Accounting, Purchases, Warehouse, Human Resources, Knowledge, Reporting, Website, and Settings. The user is logged in as Administrator (PT. Daya). The form fields are organized into sections: Subject, Branch, Customer, Address, Sales Source, Sales Person, Sales Team, Type, Warna, Order In / Leads Prospect, and Cash / Credit. The 'Cash / Credit' dropdown menu is highlighted with a red box, and a red arrow points to the 'Cash' option. The 'Cash / Credit' field shows a value of 0.00. The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 1:50 PM on 5/15/2020.

# Leads Odoo CRM System

Jika memilih **Credit**, maka akan muncul field **Leasing dan DP** yang juga wajib diisi. Cabang wajib mengisi **nama leasing dan DP** (DP bisa diset 0.0)

The screenshot displays the Odoo CRM 'Leads / New' form. The 'Order In / Leads Prospect' dropdown is set to 'Credit', which is highlighted with a red box. Below it, the 'Leasing' and 'DP' fields are visible, with 'DP' set to '0.00'. A red arrow points to the 'DP' field. The form includes various other fields such as Branch, Customer, Address, Contact Name, Email, No KTP, Phone, Pekerjaan, Priority, Source Document, Sales Date, Last Type, Last Product, Tenor, Cash/Credit, and DP. The interface also shows a sidebar with navigation options like 'Welcome Leads', 'Leads', 'Opportunities', 'Import CRM', and 'Report CRM'. The top navigation bar includes 'Messaging', 'Showroom', 'STNK BPKB', 'Workshop', 'Finance', 'Taxes', 'Sales', 'General Affair', 'Leads', 'Master', 'Advance Setting', 'API', 'Payroll', 'Accounting', 'Purchases', 'Warehouse', 'Human Resources', 'Knowledge', 'Reporting', and 'Website Settings'. The user is logged in as 'Administrator (PT. Daya ...)'.

# Leads Odoo CRM System

Field **Pekerjaan** wajib diisi

The screenshot shows the Odoo CRM interface for creating a new lead. The browser address bar indicates the URL: `192.168.3.99/web?#view_type=form&model=crm.lead&menu_id=1172&action=890`. The top navigation bar includes various modules like Messaging, Showroom, STNK/BPKB, Workshop, Finance, Taxes, Sales, General Affair, Leads, Master, Advance Setting, API, Payroll, Accounting, Purchases, Warehouse, Human Resources, Knowledge, Reporting, Website, and Settings. The user is logged in as Administrator (PT. Daya...). The left sidebar shows the navigation menu with 'Leads' selected. The main form area is titled 'Leads / New' and contains several fields for lead information. The 'Pekerjaan' field is highlighted with a red box, and its dropdown menu is open, showing a list of job types. A red arrow points to the 'Pekerjaan' field on the form. The 'Save or Discard' button is also highlighted with a red box.

Leads / New

Save or Discard

Convert to Opportunity

Subject

Branch

Customer

Address

City

State

ZIP

Country

Sales Source

Sales Person

Sales Team

Type

Warna

Order In / Leads Prospect

Cash / Credit

Leasing

DP

Contact Name

Email

No KTP

Phone

Pekerjaan

Priority

Source Document

Sales Date

Last Type

Last Product

Tenor

Cash/Credit

DP

Pegawai Negeri

Pegawai Swasta

Ojek

Wiraswasta/Pedagang

Mahasiswa/Pelajar

Guru/Dosen

TNI/Point

Search More...

0.00

Internal Notes

Extra Info

Powered by Odoo

1:54 PM 5/15/2020

# Leads Odoo CRM System

Setelah sata terisi lengkap dan **tombol save di klik**, maka akan terbentuk secara **otomatis nomor leads**.

The screenshot shows the Odoo CRM interface for a lead record. The breadcrumb path is **Leads / LDS/BAN04/2005/00191**. The lead details are as follows:

Branch	[BAN04] SOEKARNO HATTA	Contact Name	HENDRA BUDIANA (DM HO).
Customer	[BPA/1804/089339] HENDRA BUDIANA (DM HO) (10100092)	Email	
Address	JL KACAPIRING JL KACAPIRING [3200] JAWA BARAT	No KTP	3273120605790011
Sales Source	Showroom	Phone	08164667716
Sales Person	[MT-19070085] ADITYA RAMDANI	Pekerjaan	Pegawai Swasta
Sales Team	ST-SOEKARNOHATTA014	Priority	High
Type	E1F02N11S2 A/T [New Vario 125 CBS]	Source Document	
Warna	WR-WHITE RED	Sales Date	04/29/2018
Order In / Leads Prospect	Order In	Last Type	E1F02N11S2 A/T [New Vario 125 CBS]
Cash / Credit	Credit	Last Product	E1F02N11S2 A/T (WR-WHITE RED)
Leasing	[BPA/1709/002501] PT. ADIRA DINAMIKA MULTI FINANCE TBK.	Tenor	0
DP	3,500,000.00	Cash/Credit	Tunai
		DP	0.00

Additional information at the bottom of the form:

- Internal Notes: [Empty]
- Extra Info: [Empty]
- Lead created - Expected Revenue: [Empty]
- Following: [Dropdown menu]
- One follower Add others





# CONVERT TO OPPORTUNITY

Setelah opportunity terbentuk, akan muncul halaman seperti dibawah ini:

The screenshot shows the Odoo CRM interface for an Opportunity record. The browser tabs include 'Leads - Odoo', 'GLPI - Tickets', and 'Opportunity - Odoo'. The URL is '192.168.3.59:8396/web?#id=29131&view\_type=form&model=crm.lead&active\_id=1344'. The page title is 'Leads / LDS/BAN04/2005/00191'. The left sidebar shows navigation options like 'Welcome Leads', 'Leads', 'Opportunities', 'Import CRM', 'Report', and 'Report CRM'. The main content area displays the opportunity details for 'LDS/BAN04/2005/00191'. The 'Follow Up 1' button is highlighted with a red box and a red arrow. The opportunity details include:

Branch	[BAN04] SOEKARNO HATTA	Source Document	
Customer	[BPA/1804/089339] HENDRA BUDIANA (DM HO) (10100092)	Priority	High
Email		Expected Closing	
Phone	08164667716	Opportunity Status	
No KTP	3273120605790011	Note	
Pekerjaan	Pegawai Swasta	Status Leasing	
Sales Source	Showroom		
Sales Person	[MT-19070085] ADITYA RAMDANI		
Sales Team	ST-SOEKARNOHATTA014		
Type	E1F02N11S2 A/T [New Vario 125 CBS]		
Color Varian	E1F02N11S2 A/T (WR-WHITE RED)		
Order In / Leads Prospect	Order In		
Cash / Credit	Credit		
Leasing	[BPA/1709/002501] PT. ADIRA DINAMIKA MULTI FINANCE TBK.		
DP	3,500,000.00		

At the bottom, there is a 'Send a message or Log an internal note' section and a 'Following' dropdown menu. The system tray at the bottom shows the time as 2:30 PM on 5/15/2020.

# CONVERT TO OPPORTUNITY

Ketika sudah terbentuk opportunity, **status opportunity (di kanan atas)** adalah **new** dan data yang bisa diedit adalah **Expected closing, Type motor, warna motor, Cash/Credit, Nama Leasing, DP, Opportunity Status dan Status Leasing** (Status leasing akan muncul jika cabang mengisi Credit, tetapi jika cabang merubah menjadi **Cash**, maka **filed leasing, DP dan status leasing tidak akan muncul pada form**). Selain filed-field tersebut, semua data dari inputan **Leads** sudah tidak dapat dirubah kembali.

The screenshot shows the Odoo CRM interface for an Opportunity record. The browser tabs include 'Leads - Odoo', 'GLPI - Tickets', and 'Opportunity - Odoo'. The URL is '192.168.3.59:8396/web?#id=29131&view\_type=form&model=crm.lead&active\_id=1344'. The top navigation bar includes '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'. The user is 'Administrator (PT. Dava ...)'. The form title is 'Leads / LDS/BAN04/2005/00191'. The form contains the following fields:

- Subject: LDS/BAN04/2005/00191
- Branch: [BAN04] SOEKARNO HATTA
- Customer: [BPA/1804/089330] HENDRA BUDIANA (DM HO) (10100092)
- Source Document: [Empty]
- Priority: High
- Expected Closing: [Empty]
- Opportunity Status: [Empty]
- Note: [Empty]
- Status Leasing: [Empty]
- Type: E1F02N11S2 A/T (New Vario 125 CBS)
- Color Varian: E1F02N11S2 A/T (WR-WHITE RED)
- Order In / Leads Prospect: [Empty]
- Cash / Credit: Credit
- Leasing: [BPA/1709/002501] PT. ADIRA DINAMIKA MULTI FINANCE TBK.
- DP: 3.500.000.00

Buttons at the top include 'Save or Discard', 'Mark as Won', 'Mark as Lost', and 'Follow Up 1'. A 'New' button is highlighted in a red box. A red arrow points to the 'Leasing' dropdown.

# CONVERT TO OPPORTUNITY

Jika **dirubah menjadi Cash**, tampilannya akan seperti dibawah ini:

The screenshot shows the Odoo CRM interface for an Opportunity record. The record ID is LDS/BAN04/2005/00191. The form is divided into several sections:

- Buttons:** At the top, there are buttons for "Save" and "Discard". Below them, three buttons are highlighted with a red box: "Mark as Won", "Mark as Lost", and "Follow Up 1".
- Subject:** LDS/BAN04/2005/00191
- Branch:** [BAN04] SOEKARNO HATTA
- Customer:** [BPA/1804/089339] HENDRA BUDIANA (DM HO) (10100092)
- Phone:** 08164667716
- No KTP:** 3273120605790011
- Pekerjaan:** Pegawai Swasta
- Sales Source:** Showroom
- Sales Person:** [MT-19070085] ADITYA RAMDANI
- Sales Team:** ST-SOEKARNOHATTA014
- Type:** E1F02N11S2 A/T (New Vario 125 CBS) (highlighted with a red box and an arrow)
- Color Varian:** E1F02N11S2 A/T (WR-WHITE RED)
- Order In / Leads Prospect:** Order In
- Cash / Credit:** Cash (highlighted with a red box and an arrow)

The bottom of the screen shows a taskbar with various application icons and a system tray with the date 5/15/2020 and time 2:36 PM.

Kemudian pada halaman *opportunity* terdapat 4 tombol, yaitu *edit*, *mark as won*, *mark as lost* dan *Follow up 1*. Untuk melanjutkan ke proses Follow Up 1, tombol Follow up 1 harus di klik.



# 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**.

The screenshot displays the Odoo CRM interface for a lead with ID LDS/BAN04/2005/00191. The interface is divided into several sections:

- Navigation Menu (Left):** Includes 'Welcome Leads', 'Leads', 'Opportunities', 'Import CRM', 'Report', and 'Report CRM'.
- Form Fields (Main):**
  - Subject:** LDS/BAN04/2005/00191
  - Branch:** [BAN04] SOEKARNO HATTA
  - Customer:** [BPA/1804/089339] HENDRA BUDIANA (DM HO) (10100092)
  - Phone:** 08164667716
  - No KTP:** 3273120605790011
  - Pekerjaan:** Pegawai Swasta
  - Sales Source:** Showroom
  - Sales Person:** [MT-19070085] ADITYA RAMDANI
  - Sales Team:** ST-SOEKARNOHATTA014
  - Type:** E1902N11S2 A/T New Vario 125 CBS1
  - Color Varian:** E1902N11S2 A/T (WR-WHITE RED) (highlighted with a red box)
  - Order In / Leads Prospect:** Order In
  - Cash / Credit:** Cash
- Right Panel (Follow-up Configuration):**
  - Priority:** High
  - Follow Up 1:** (dropdown)
  - Next Plan Follow Up 2:** (dropdown)
  - Expected Closing:** 05/31/2020
  - Opportunity Status:** HOT PROSPECT (highlighted with a red box and a red arrow)
  - Note:** (text area)
  - Status Customer:** (dropdown)
- Buttons (Top):** Save or Discard, Mark as Won, Mark as Lost, Follow Up 2, and Follow Up 1 (highlighted with a red box).
- Footer:** Internal Notes, Lead, Fund Raising, and a chat window showing a message from Administrator.

# CONVERT TO OPPORTUNITY

Field **next plan follow up 2** wajib diisi jika cabang akan melakukan follow up 2. Jika tidak diisi, maka akan muncul warning seperti dibawah ini:

The screenshot shows the Odoo CRM interface for a lead record. A warning dialog box is displayed in the center, with the following text:

**Odoo Warning**

Warning!

MOHON ISI NEXT PLAN FOLLOW UP 2 TERLEBIH DAHULU

Ok

The background interface shows the lead record for **LDS/BAN04/2005/00191**. The lead is in the **Follow Up 2** stage. The **Next Plan Follow Up 2** field is empty, which triggers the warning. The lead details include:

- Branch: [BAN04] SOEKARNO HATTA
- Customer: [BPA/1804/089339] HENDRA BUDIANA (DM HO) (10100092)
- Email: [MT-19070085] ADITYA RAMDANI
- Phone: 08164667716
- No KTP: 3273120605790011
- Pekerjaan: Pegawai Swasta
- Sales Source: Showroom
- Sales Person: [MT-19070085] ADITYA RAMDANI
- Sales Team: ST-SOEKARNOHATTA014
- Type: E1F02N11S2 A/T [New Vario 125 CBS]
- Color Varian: E1F02N11S2 A/T (WR-WHITE RED)
- Order In / Leads Prospect: Order In
- Cash / Credit: Cash

The interface also shows a sidebar with navigation options like **Leads**, **Opportunities**, and **Report**. The top navigation bar includes **Leads**, **Master**, **Advance Setting**, **API**, **Payroll**, **Accounting**, **Purchases**, **Warehouse**, **Human Resources**, **Knowledge**, **Reporting**, and **Website**. The bottom status bar shows the system is **Powered by Odoo** and the current time is **2:44 PM 5/15/2020**.



# 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 displays the Odoo CRM interface. A pop-up dialog box titled "Make Leads Lost" is centered on the screen, highlighted with a red border. The dialog contains a "Reason" text area, a "Lead id" dropdown menu showing "LDS/BAN04/2005/00191", and "Make it Lost" and "Cancel" buttons. A red arrow points to the dialog box. The background shows the lead record for "LDS/BAN04/2005/00191" with various fields like Branch, Customer, Email, Phone, No KTP, Pekerjaan, Sales Source, Sales Person, Sales Team, Type, Color Varian, Order In / Leads Prospect, and Cash / Credit. The interface also includes a sidebar with navigation options like "Welcome Leads", "Leads", "Opportunities", and "Report CRM". The top navigation bar shows various modules like "Sales", "General", "Finance", etc. The bottom status bar shows the system time as 2:46 PM on 5/15/2020.

# 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 an Opportunity record. The top navigation bar includes 'Leads - Odoo', 'GLPI - Tickets', and 'Opportunity - Odoo'. The breadcrumb trail is 'Leads / LDS/BAN04/2005/00191'. The left sidebar contains navigation options like 'Leads', 'Opportunities', and 'Report'. The main content area displays the opportunity details, including customer information, sales source, and follow-up dates. The 'Follow Up 2' button is highlighted in red, and the 'Follow Up 2' date field is also highlighted in red with a red arrow pointing to it. The 'Expected Revenue' field is empty.

Field	Value
Branch	[BAN04] SOEKARNO HATTA
Customer	[BPA/1804/089339] HENDRA BUDIANA (DM HO) (10100092)
Email	
Phone	08164667716
No KTP	3273120605790011
Pekerjaan	Pegawai Swasta
Sales Source	Showroom
Sales Person	[MT-19070085] ADITYA RAMDANI
Sales Team	ST-SOEKARNOHATTA014
Type	E1F02N11S2 A/T (New Vario 125 CBS)
Color Varian	E1F02N11S2 A/T (WR-WHITE RED)
Order In / Leads Prospect	Order In
Cash / Credit	Cash
Source Document	
Priority	High
Follow Up 1	05/15/2020
Next Plan Follow Up 2	05/17/2020
Follow Up 2	
Next Plan Follow Up 3	
Expected Closing	05/31/2020
Opportunity Status	HOT PROSPECT
Note	
Status Customer	Terhubung

# 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 shows the lead ID: **LDS/BAN04/2005/00191**. Below this, there are buttons for **Mark as Won** and **Mark as Lost**, and a **Follow Up 3** button. The main content area shows the lead details for **LDS/BAN04/2005/00191**, including customer information and a follow-up schedule table.

Follow Up	Date
Follow Up 1	05/15/2020
Next Plan Follow Up 2	05/17/2020
Follow Up 2	05/17/2020
Next Plan Follow Up 3	05/19/2020
Follow Up 3	05/19/2020

Additional fields shown include: Priority: High, Expected Closing: 05/31/2020, Opportunity Status: HOT PROSPECT, and Status Customer: Terhubung.

# 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), ***Expected Closing, Opportunity status, Type motor, Warna motor, Cash/credit dan Status customer***. Sementara ***field Follow Up 1, Next Plan Follow Up 2, Follow up 2, Next lan 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 Dealer Memo** 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: `192.168.3.59:8396/web/?#id=29131&view_type=form&model=crm.lead&active_id=1344`. The page title is "Leads / LDS/BAN04/2005/00191".

Key elements on the page include:

- A sidebar menu on the left with options like "Welcome Leads", "Leads", "Opportunities", "Import CRM", and "Report CRM".
- A top navigation bar with various modules like "Messaging", "Showroom", "STNK BPKB", "Workshop", "Finance", "Taxes", "Sales", "General Affair", "Leads", "Master", "Advance Setting", "API", "Payroll", "Accounting", "Purchases", "Warehouse", "Human Resources", "Knowledge", "Reporting", "Website", and "Settings".
- A "Create Dealer Memo" button highlighted with a red box.
- A "Won" button highlighted with a red box.
- A red text box on the right side of the page containing the text: "Semua data yang terisi sudah tidak bisa dirubah kembali".
- A table of lead details with the following data:

Field	Value
Branch	[BAN04] SOEKARNO HATTA
Customer	[BPA/1804/089339] HENDRA BUDIANA (DM HO) (10100092)
Email	
Phone	08164667716
No KTP	3273120605790011
Pekerjaan	Pegawai Swasta
Sales Source	Showroom
Sales Person	[MT-19070085] ADITYA RAMDANI
Sales Team	ST-SOEKARNOHATTA014
Type	E1F02N11S2 A/T [New Vario 125 CBS]
Color Varian	E1F02N11S2 A/T (WR-WHITE RED)
Order In / Leads Prospect	Order In
Cash / Credit	Cash

Additional details shown include:

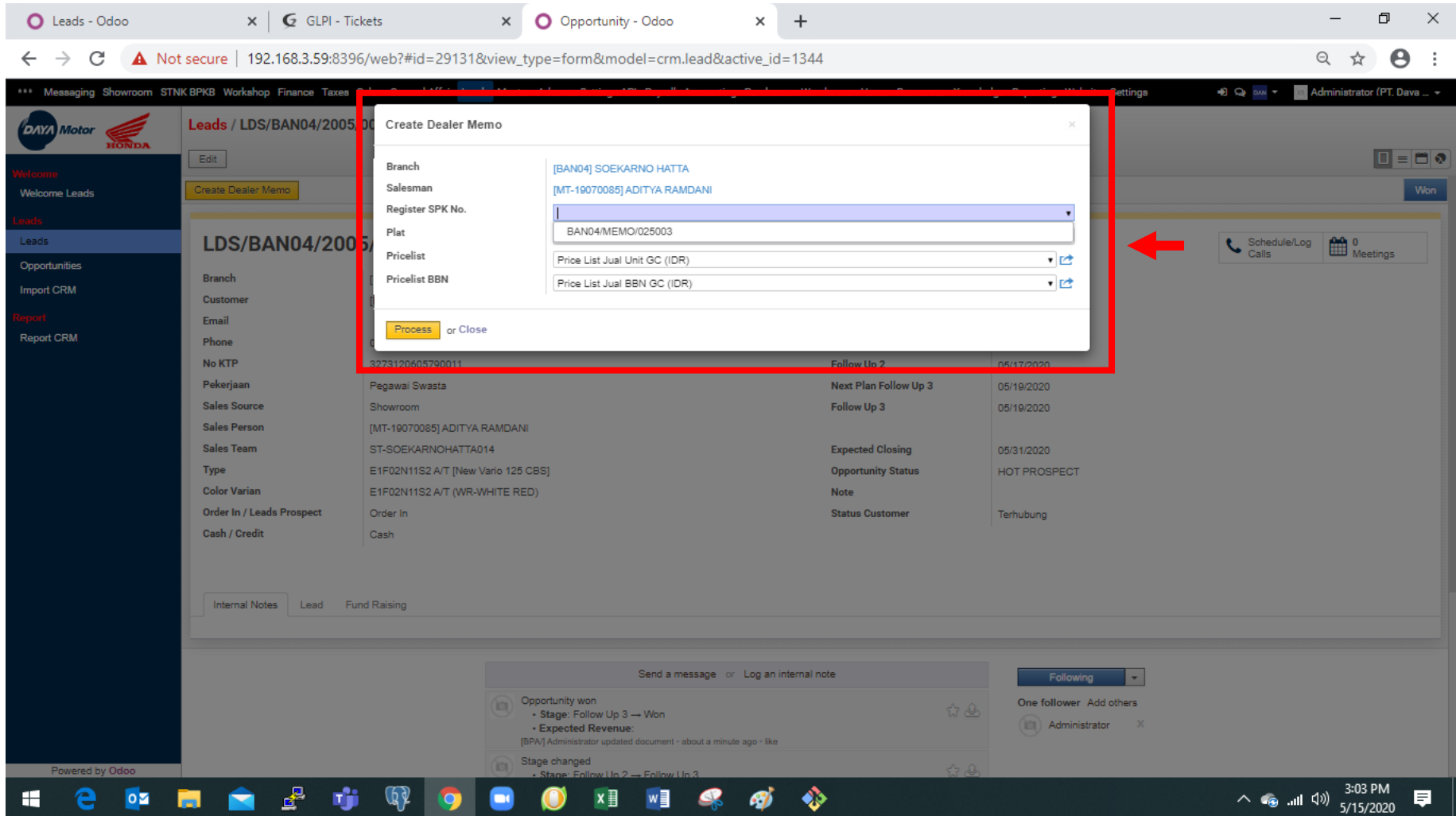
- Source Document: [BPA/1804/089339] HENDRA BUDIANA (DM HO) (10100092)
- Priority: High
- Follow Up 1: 05/15/2020
- Next Plan Follow Up 2: 05/17/2020
- Follow Up 2: 05/17/2020
- Next Plan Follow Up 3: 05/19/2020
- Follow Up 3: 05/19/2020
- Expected Closing: 05/31/2020
- Opportunity Status: HOT PROSPECT
- Note: [BPA/1804/089339] HENDRA BUDIANA (DM HO) (10100092)
- Status Customer: Terhubung

At the bottom, there is a "Send a message" or "Log an internal note" section and a "Following" dropdown menu showing "One follower: Administrator".



# CREATE DEALER MEMO

Ketika tombol **Create Dealer Memo** di klik akan muncul tampilan seperti dibawah ini:



The screenshot displays the Odoo CRM interface. The browser tabs include 'Leads - Odoo', 'GLPI - Tickets', and 'Opportunity - Odoo'. The URL is '192.168.3.59:8396/web?#id=29131&view\_type=form&model=crm.lead&active\_id=1344'. The main content area shows the 'Create Dealer Memo' form for lead 'LDS/BAN04/2005'. The form fields are:

- Branch: [BAN04] SOEKARNO HATTA
- Salesman: [MT-19070085] ADITYA RAMDANI
- Register SPK No.: [Dropdown menu]
- Plat: BAN04/MEMO/025003
- Pricelist: Price List Jual Unit GC (IDR)
- Pricelist BBN: Price List Jual BBN GC (IDR)

Buttons: [Process] or Close

On the right side of the form, there is a red arrow pointing to the 'Schedule/Log Calls' button. Below the form, there is a table of follow-up actions:

No	Follow Up	Date
3273120605790011	Follow Up 2	05/17/2020
	Next Plan Follow Up 3	05/19/2020
	Follow Up 3	05/19/2020
	Expected Closing	05/31/2020
	Opportunity Status	HOT PROSPECT
	Note	
	Status Customer	Terhubung

At the bottom, there is a 'Send a message' or 'Log an internal note' section with a 'Following' dropdown menu and a list of followers including 'Administrator'.

# CREATE DEALER MEMO

Cabang harus memasukan **nomor register memo** atas nama **sales person** tersebut.

The screenshot displays the Odoo CRM interface for an opportunity. A modal window titled "Create Dealer Memo" is open, containing the following fields:

- Branch: [BIN01] BINJAI
- Salesman: [10100082] DENI SETIAWAN MAULANA
- Register SPK No.: BIN01/MEMO/013581
- Plat: Hitam
- Pricelist: Price List Jual Unit Area Binjai, Medan (IDR)
- Pricelist BBN: Price List BBN Jual Unit Area Binjai, Medan (IDR)

At the bottom of the modal, there are "Process" and "Close" buttons. A red arrow points to the "Process" button. The background shows the opportunity details for "LDS/BIN01/2003" with a salesperson "DENI SETIAWAN MAULANA".

# CREATE DEALER MEMO

Untuk membentuk **Dealer Memo**, klik **Process**.

The screenshot shows the Odoo Dealer Memo form. The breadcrumb trail is "Opportunities / LDS/BIN01/2... / DMO-S/BIN01/2003/04115". The "Process" button is highlighted with a red box and a red arrow. The form fields are as follows:

Branch	[BIN01] BINJAI	Division	Showroom
Date Memo	03/27/2020	Proposal Event Ref.	
Customer	[BPA/1810/513427] EGI AYU PRATIWI MANDAY	No KTP	1275016606980007
Customer Branch		Alamat Kirim	
Payable Balance	3,267,000.00	Is PIC	<input type="checkbox"/>
Sales Person	[10100082] DENI SETIAWAN MAULANA	Source Document	
Sales Team	ST-BINJAI-007 / ST-BINJAI-001	Pricelist	Price List Jual Unit Area Binjai, Medan (IDR)
Register No	BIN01/MEMO/013581	Pricelist BBN	Price List BBN Jual Unit Area Binjai, Medan (IDR)
Sales Source	Leads		
Credit	<input type="checkbox"/>		

At the bottom, there is a table with the following data:

Category	Type	Warna	Qty	BBN	Nama STNK	CDDB	Tanda Jadi	Jaminan Pembelian PO	Potongan Pelanggan	Indent
Unit	A1F02N38M1K A/T [VARIO 125 CBS JKT SF]	A1F02N38M1K A/T (WL-WHITE BLUE)	1	Y	[BPA/1810/513427] EGI AYU PRATIWI MANDAY		0.00		0.00	0.00 <input type="checkbox"/>

Setelah terbentuk **Dealer Memo**, maka akan dilanjutkan prosesnya oleh **Sales Admin**.

# EKSPORT REPORT

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

The screenshot shows a web browser window with the URL `odm.dayamotor.com/web?#view_type=form&model=crm.lead&menu_id=1172&action=890`. The browser's address bar and tabs are visible. The main content area shows a CRM interface with a sidebar on the left containing menu items like 'Welcome Leads', 'Leads', 'Opportunities', 'Import CRM', 'Leads WOR', 'Opportunities WOR', 'Report', and 'Report CRM'. A modal dialog box titled 'Laporan CRM' is open, containing the following fields:

- Type Prospect:
- Type:
- Tanggal: 12/17/2020

Below the fields is a table with the following columns: Company, Code, Name, Branch Type, Status. The table is currently empty, with an 'Add an item' button below it. At the bottom of the dialog box, there are 'Export' and 'Cancel' buttons. A red arrow points to the 'Export' button.



# EKSPORT REPORT

Tipe yang dipilih **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**.

odm.dayamotor.com/web?#view\_type=form&model=crm.lead&menu\_id=1172&action=890

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

ANDRI PERMANA (PT. D...)

### Laporan CRM

Tipe Prospect

Tipe

Tanggal

12/17/2020

Branches

Company	Code	Name	Branch Type	Status
Add an item				

Export or Cancel

← Pilih Tipe Prospect H1

Powered by Odoo

8:08 AM



# 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.

The screenshot shows a web browser window with a CRM application. The browser's address bar shows the URL: `odm.daya-motor.com/web?#view_type=form&model=crm.lead&menu_id=1172&action=890`. The application's navigation menu includes: Messaging, Showroom, Workshop, Sales, Leads, Master, API, Accounting, Purchases, Warehouse, Human Resources, Website, and Settings. The user is logged in as ANDRI PERMANA (PT. D...).

The main content area displays a 'Laporan CRM' modal window. The window has a title bar with 'Laporan CRM' and a close button. It contains the following fields:

- Tipe Prospect:** A dropdown menu with 'H1' selected.
- Tipe:** A dropdown menu with 'All' selected. A red arrow points to this option with the text 'Pilih Tipe All'.
- Tanggal:** A date input field.
- Branches:** A tabbed interface with 'Branches' selected.

Below these fields is a table with the following columns: Company, Code, Name, Branch Type, and Status. The table is currently empty, with an 'Add an item' link below the header.

At the bottom of the modal window, there are two buttons: 'Export' (with a download icon) and 'Cancel'.

# 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**.

The screenshot shows a web browser window with a CRM application. The browser's address bar shows the URL: `odm.dayamotor.com/web?#view_type=form&model=crm.lead&menu_id=1172&action=890`. The CRM interface includes a navigation menu with options like 'Messaging', 'Showroom', 'Workshop', 'Sales', 'Leads', 'Master', 'API', 'Accounting', 'Purchases', 'Warehouse', 'Human Resources', and 'Website Settings'. The 'Leads' menu is active. A modal window titled 'Laporan CRM' is open, displaying a form with the following fields:

- Tipe Prospect**: H1
- Tipe**: All
- Tanggal**: 12/17/2020

The date selection interface shows a calendar for December 2020. The date 17 is highlighted in blue. A red box surrounds the date selection area, and a red arrow points to it with the text 'Pilih Periode Tanggal'. Below the calendar, there are buttons for 'Today' and 'Done'. At the bottom of the modal, there is an 'Export' button and the text 'or Cancel'.

*Lalu klik export.*



*Jerima Kasih*