

# CRM

CRM

- [Sales Produk Target](#)

# Sales Produk Target

## 1. Tujuan

Submodul Sales Target digunakan untuk mengelola target penjualan per periode, per produk/SKU, dan per sales team. Modul ini mendukung input manual maupun upload massal, serta menyediakan fitur download template untuk mempermudah pengisian.

## 2. Flow Proses

Perencanaan Target - Manajemen menentukan target penjualan berdasarkan periode (bulanan/kuartal/tahunan).

Input Data - Target dimasukkan ke sistem ERP melalui form input atau upload file.

Validasi - Sistem melakukan pengecekan format dan konsistensi data.

Monitoring - Target yang sudah tersimpan dapat dibandingkan dengan realisasi penjualan.

Reporting - Data target digunakan dalam laporan pencapaian sales.

## 3. Cara Input Sales Target

Masuk ke menu CRM → Sales Produk Target.

Klik tombol Tambah Target.

Isi field: Periode, Produk/SKU, Salesperson, Target Qty, Target Value.

Simpan dengan klik Submit.

Sistem akan menampilkan data di tabel target.

The screenshot shows the Kokola software interface. At the top, there is a navigation bar with icons for General Ledger, CRM, AR, Sales, Job Management, and Direc. Below the navigation bar is a table with 20 rows. Each row contains a number (7 to 20), the name 'Agung Nugraha', and the value '71'. At the bottom of the table, there are two buttons: 'New' and 'Upload'.

General Ledger	CRM	AR	Sales	Job Management	Dirac
7.	Agung Nugraha	71			
8.	Agung Nugraha	71			
9.	Agung Nugraha	71			
10.	Agung Nugraha	71			
11.	Agung Nugraha	71			
12.	Agung Nugraha	71			
13.	Agung Nugraha	71			
14.	Agung Nugraha	71			
15.	Agung Nugraha	71			
16.	Agung Nugraha	71			
17.	Agung Nugraha	71			
18.	Agung Nugraha	71			
19.	Agung Nugraha	71			
20.	Agung Nugraha	71			

New Upload

## 4. Cara Download Template

Klik tombol Download Template pada halaman Sales Target.

File Excel (.xlsx) akan terunduh berisi kolom standar: Periode, Produk, Salesperson, Target Qty, Target Value.

Template ini digunakan untuk upload massal.

## 5. Cara Upload Sales Target

Klik tombol Upload Target.

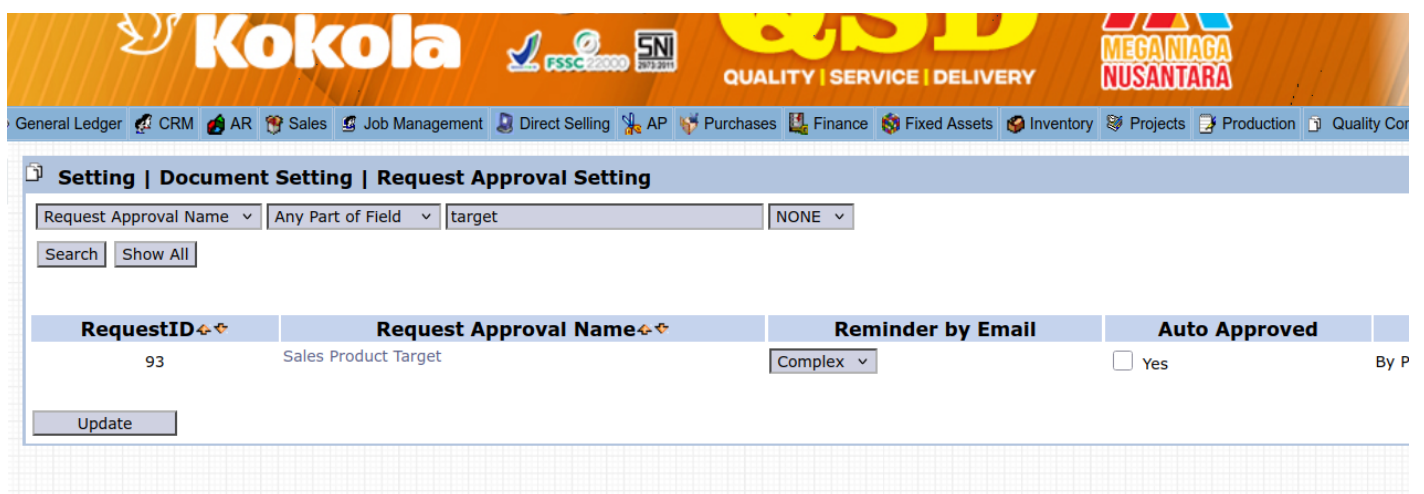
Pilih file Excel sesuai format template.

Sistem akan melakukan validasi (periode, SKU, format angka).

Jika valid, data otomatis masuk ke tabel target. Jika ada error, sistem menampilkan pesan perbaikan.

## 6. Approval Setting

Masuk ke menu Setting Document Approval . cari Patern Dccument "Sales Product Target" . kemudian tentuan Approval routenya



The screenshot displays the 'Request Approval Setting' page. At the top, there is a navigation bar with various modules like General Ledger, CRM, AR, Sales, Job Management, Direct Selling, AP, Purchases, Finance, Fixed Assets, Inventory, Projects, Production, and Quality Control. Below the navigation bar, the page title is 'Setting | Document Setting | Request Approval Setting'. There is a search bar with 'Request Approval Name' and 'Any Part of Field' dropdowns, and a text input field containing 'target'. A 'NONE' dropdown is also present. Below the search bar are 'Search' and 'Show All' buttons. The main content area is a table with the following columns: RequestID, Request Approval Name, Reminder by Email, and Auto Approved. The table contains one row with the following data: RequestID: 93, Request Approval Name: Sales Product Target, Reminder by Email: Complex, and Auto Approved: Yes. There is an 'Update' button below the table.

RequestID	Request Approval Name	Reminder by Email	Auto Approved
93	Sales Product Target	Complex	<input type="checkbox"/> Yes

## 7. Report

Pastikan format file sesuai template.

Gunakan kode SKU yang sudah terdaftar di master data.

QUALITY SERVICE DELIVERY **NU**

General Ledger CRM AR Sales Job Management Direct Selling AP Purchases Finance Fixed Assets Inventory

**Sales | Sales Report | SalesAnalysis**

Category Type: FINISHED GOOD

Customer Date: From 1 June 2026 To 30 June 2026

Based On:  Invoice  Sales Order  Shipment Notes  Sales Target


Currency:  Respective Currency  Base Currency

Custom Template

**Analysis Report**

Periksa kembali periode agar tidak terjadi duplikasi target.

Tampilkan di Sales Analysis



## Sales Analysis

**Report Filters**

Sales Target : FG

01 Jun 2026 - 30 Jun 2026

**Bruto(kg)**

**Sales(Qty)**

**Selling Gross**

**Selling Discount**

**COGS**

**Margin**

Search:

Customer Name	Item Name	Item Category	Date
<input type="text" value="Select value"/> x	<input type="text" value="Select value"/> x	<input type="text" value="Select value"/> x	<input type="text" value="2026-06-01"/> x
ISTANA BUAH	BK/Montego Gold Matcha 80 gr (8 x 10 gr) /24 showbox/00	KOKOLA REGULER	06-06-2026