

# CRM Module

- [Opportunity](#)
- [Activity](#)
- [Complaint Management](#)
- [Service Note](#)
- [Service Note Inbox](#)
- [Service Sheet](#)
- [Service Sheet Inbox](#)
- [Sales Target](#)
- [Sales Target Inbox](#)
- [Sales Stage Target Percentage](#)
- [Closing Sales Period](#)
- [Manage Warranty](#)
- [Campaign List](#)
- [Activity History Report](#)
- [Current Sales Stage](#)
- [Performance Each Account Officer](#)
- [Sales Product Target](#)
- [Campaign Report](#)
- [Campaign Budget Expenses](#)

# Opportunity

## Module Guide: Opportunity

### Module Location

CRM > Opportunity

### Module Objective

The **Opportunity** module is the primary tool for the sales team to track all potential sales transactions or deals. Each "Opportunity" entry represents one potential business deal, which is tracked through various **sales stages** until the deal is **won** or **lost**. This module is crucial for managing the **sales pipeline** and creating a **sales forecast**.

## 1. Main View (Opportunity List)

The main page of this module displays a list of all sales opportunities that exist in the system.



The screenshot shows the CRM Opportunity List interface. At the top, there is a search bar with a dropdown menu for 'Opportunity' and a 'Show All' button. Below the search bar, there are date filters for 'Date From' (1 July 2025) and 'Date To' (31 July 2025), along with a 'Search' button. The table header includes columns for 'No.', 'Opportunity', 'Status', 'Date Created', 'Customer', 'Sales Stage', 'Probability', 'Price', 'Account Officer', and 'Last Update'. A 'New' button is located at the bottom left of the table area.

No.	Opportunity	Status	Date Created	Customer	Sales Stage	Probability	Price	Account Officer	Last Update
...: No Record ...									

### View Explanation

This page provides a general overview of the company's entire sales pipeline.

- **Filters:** You can search for a specific opportunity using filters based on the Opportunity name/code or a **Date From** and **Date To** range.

- **Opportunity List:** The table below displays all opportunities that match the filters. Its columns include **Opportunity**, **Status**, **Customer**, **Sales Stage**, **Probability**, **Price**, and **Account Officer**.
- **New Button:** The primary button to create a new Opportunity entry.

## 2. Steps to Manage an Opportunity

The following is the complete workflow from creating to updating an Opportunity.

### Step 1: Create a New Opportunity

From the Main View, click the **New** button in the bottom-left corner to open the **New Opportunity** form. 

### Step 2: Fill in Opportunity Details (New Opportunity Form)

Fill in all the relevant information on the form that appears. Fields marked with  are mandatory.

- **Company Name & Contact Person:** Select the company name and contact person from the list of registered customers.

Company Name *	:	<input type="text" value="--No Account--"/>
Contact Person *	:	<input type="text" value="--No Contact--"/>

- **Opportunity Name:** Give a specific name for this opportunity, for example: "Production Machine Offer Batch 2".

Opportunity Name *	:	<input type="text"/>
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- **List of Item:** Select the product or service the customer is interested in.

List of Item \*  
[+] [-]

:

- **Estimate Closed Date:** Enter the estimated date when this deal will be finalized (won or lost).

Estimate Closed Date : 31 July 2025 

- **Sales Person:** Assign the salesperson responsible for this opportunity.

Sales Stage : --No Sales Stage-- ▼

- **Description:** Provide additional notes or a description regarding this opportunity.

Description :

Remaining Text: 255

- **Sales Stage:** Select the initial stage of the sales process (e.g., Prospecting, Qualification).

Sales Stage : --No Sales Stage-- ▼

- **Price:** Enter the estimated total value of this sale.

Price \* : 0.00

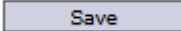
- **Probability:** Enter the percentage chance that this deal will be successful.

Probability : 0 % ▼

- **Status:** Select the initial status of the opportunity (e.g., Open).

Status : --No Status-- ▼

### Step 3: Save the Opportunity

After all mandatory fields have been completed, click the **Save** button at the bottom to save the new opportunity. The opportunity will now appear in the Main View. 

### Step 4: Update the Opportunity

As the sales process progresses (e.g., after a presentation or negotiation), the responsible Sales Person must regularly reopen and update the opportunity data, especially the **Sales Stage** and **Probability** columns, to reflect the latest progress.

## Tips & Important Notes

- This module is the main work tool for the **Sales Local** and **International Business** teams to manage their daily sales activities.
- By keeping the data in this module **up-to-date**, management can see an accurate **sales pipeline** and create a more reliable **sales forecast**.
- Each **Sales Stage** typically has a standard **Probability** associated with it, which helps in weighting the sales forecast.

# Activity

## Module Guide: Activity

### Module Location

CRM > Activity

### Module Objective

The **Activity** module functions as a calendar and work agenda for the sales team. Its purpose is to plan, view, and manage all customer-related activities, such as meeting schedules, phone calls, tasks, and follow-ups. Using this module effectively helps ensure all prospects and customers are handled properly and on time.

## 1. Main View (Activity Calendar)

The main page of this module is an interactive calendar view that provides a visual overview of your activity schedule.

The screenshot displays the CRM Activity module interface. At the top, there are three monthly calendar views: July 2025, August 2025 (selected), and September 2025. The August 2025 calendar shows a grid of dates with color-coded cells: blue for 'Today', red for 'Holiday', yellow for 'Rescheduled', green for 'Selected Date', and blue for 'Activity Type'. The date August 13, 2025, is highlighted in green. Below the calendar is a detailed activity schedule for Wednesday, August 13, 2025, showing a time slot from 08:00 to 21:00. The schedule is currently empty, with the text 'Activities Sort By Priority' and '...No Activity!...' visible. A legend on the right side of the interface explains the color coding: Activity (blue), Today (blue), Holiday (red), Rescheduled (yellow), Selected Date (green), and Activity Type (blue).

### View Explanation

- **Monthly Calendar View:** Displays the schedule in a monthly format, complete with color codes corresponding to the

**Legend** on the right side.

- **Daily Schedule (Schedule for):** Displays a detailed hourly schedule for the selected date.
- **Activity List (Activities Sort by Priority):** Displays a list of activities for the selected day.

## Understanding the Legend

Pay attention to the **Legend** box on the upper-right side to understand the meaning of each color on the calendar:

- **Activity:** There is a scheduled activity.
- **Today:** Marker for the current day.
- **Holiday:** A public holiday.
- **Rescheduled:** A rescheduled activity.
- **Done:** An activity that has been completed.

## 2. Steps to Manage Activities

The following is the complete workflow for creating and managing an Activity.

### Step 1: Create a New Activity

To add a new activity, **double-click** on the desired time slot in the **Schedule for** section or directly on a date in the calendar. This action will open the **Add Activity** form.

**Schedule for :**

- 08:00
- 09:00
- 10:00
- 11:00
- 12:00
- 13:00
- 14:00
- 15:00
- 16:00
- 17:00
- 18:00
- 19:00
- 20:00
- 21:00

## Step 2: Fill in Activity Details (Add Activity Form)

Fill in all the relevant information on the form that appears. Fields marked with (\*) are mandatory.


- **Customer Type, Company Name, Opportunity, Contact Person:** Link this activity to the relevant customer or sales opportunity. This is important for tracking interaction history.

Customer Type :  New Customer  Old Customer  
Company Name : --No Account--  
Opportunity : --No Opportunity--  
Contact Person : --No Contact--

- **Activity Type:** Choose the type of activity from the dropdown (e.g., Meeting, Call, Email). Activity Type \* : --No Activity--

- **From / To:** Set the start and end date and time for the activity.  
From : 13 August 2025 08 : 00 (hh : mm)  
To : 13 August 2025 08 : 00 (hh : mm)

- **Reminder:** Set a reminder if needed so you don't miss the schedule.

Reminder :  13 August 2025  00 : 00 (hh : mm)

- **Description:** Fill in a detailed description or the purpose of this activity.

Description \* :

- **Priority & Status:** Set the priority (e.g., High, Normal, Low) and the initial status of the activity.

Status :

Priority :

### Step 3: Save the Activity

After all mandatory fields have been completed, click the **Save** button at the bottom to save the new activity. The activity will now appear as a colored block on your Activity Calendar.

### Step 4: Update Activity Status

After an activity has been completed, reopen the activity from the calendar and change its status to "Done". This will change the activity's color on the calendar according to the Legend.

## Tips & Important Notes

- Use this module every morning to plan your work and ensure you don't miss any important appointments or tasks.
- By always linking activities to the relevant **Opportunity**, you can build a complete interaction history for each potential sale.

- The **Export To MS Excel** feature can be used to create your weekly or monthly activity reports for reporting purposes to your superior.

# Complaint Management

## Module Guide: Complaint Management

### Module Location

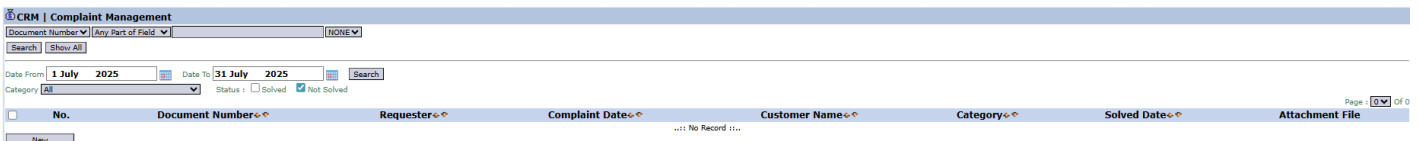
CRM > Complaint Management

### Module Objective

The **Complaint Management** module functions as a centralized system to record, track, manage, and resolve every complaint received from customers. Using this module helps the company handle issues systematically, improve customer satisfaction, and identify frequently recurring problems with products or services.

## 1. Main View (Complaint List)

The main page of this module displays a list of all customer complaints that have been recorded in the system.



The screenshot shows the CRM Complaint Management interface. At the top, there is a search bar with a dropdown menu for 'Document Number' and a 'NONE' button. Below the search bar, there are filters for 'Date From' (1 July 2025), 'Date To' (31 July 2025), and 'Category' (All). There are also checkboxes for 'Status' (Solved and Not Solved). The main area displays a table with columns: No., Document Number, Requester, Complaint Date, Customer Name, Category, Solved Date, and Attachment File. The table is currently empty, showing 'No Record'. A 'New' button is located at the bottom left.

### View Explanation

This page serves as a dashboard to monitor all incoming complaints.

- **Filters:** You can search for a specific complaint by **Document Number**, a **Date** range, **Category**, or most importantly, by **Status (Solved / Not Solved)**.

- **Complaint List:** The table below displays a summary of each complaint, with columns such as **Document Number**, **Requester**, **Complaint Date**, **Customer Name**, and **Category**.

## Button Functions

- **New:** The primary button to record a new complaint received from a customer.

## 2. Steps to Manage a Complaint

The following is the complete workflow from recording to resolving a customer complaint.


### Step 1: Record a New Complaint


From the Main View, click the **New** button to open the **Add Complaint Management** form. 

### Step 2: Fill in Complaint Details


Fill in all the relevant information on the form that appears. Fields marked with (\*) are mandatory.

- **Complaint Date & Customer:** Select the date the complaint was received and the name of the complaining customer from the dropdown.

Complaint Date  

Customer \*  

- **Category:** Choose the most appropriate complaint category (e.g., Product Quality, Delivery Delay, etc.).

Category \*  

- **Attachment / Reference Documents:** Attach supporting files (photos, emails) or link to other documents in the system (such as an invoice number or delivery order).

Attachment

Choose File No file chosen

- **Item Complained:** If the complaint is related to a specific product, click the **[+]** icon and add the product details in this section, such as **Item Code** and **Qty**. [\[+ Item Complained\]](#) [\[-\]](#)

- **Complaint Description:** Write down the details of the customer's complaint and completely in the description

field.

Complaint Description  Solved

### Step 3: Save the Complaint

Click the **Save** button to record the new complaint into the system. Its status will automatically be set to 'Not Solved'.

### Step 4: Update Resolution Status

After the complaint has been successfully handled and a solution has been provided to the customer, reopen the complaint entry, add notes regarding its resolution, and check the **Solved** box.  Solved

## Tips & Important Notes

- Use the **Status** filter on the main page to quickly see all complaints that are still open (**Not Solved**) and require immediate follow-up.
- Always attach relevant supporting evidence using the **Attachment** or **Reference Documents** features to strengthen the record and facilitate investigation.

- This module is an important tool for the **Customer Service, Sales, and Quality Assurance** teams to monitor and improve the quality of services and products.

# Service Note

## Module Location

CRM > Service Note > Service Note

## Module Objective

The **Service Recording** module functions as a system to document and manage all service activities provided to customers. This can include repair services, maintenance, or other after-sales services. This module helps track the entire process, from receiving the item from the customer, through the work process, to returning the item after the service is complete.

## 1. Main View (Service Recording List)

The main page of this module displays a list of all Service Recording documents that have been created.



## View Explanation

This page is the center for viewing and managing all service records that are ongoing or have been completed.

- **Filters:** You can search for a specific service record by **Service Recording Number** or a **Start Date** and **End Date** range.
- **Service List:** The table below displays a summary of each service, with columns such as **Service Recording Number**,

**Start Date, Customer, Status, and Approval.**

## Button Functions

- **New:** The primary button to create a new service record.

## 2. Steps to Record a New Service

The following is the complete workflow for recording a new service.



### Step 1: Create a New Service Record

From the Main View, click the **New** button to open the **Add Service Recording** form. 

### Step 2: Fill in General Service Information

Fill in all the general information at the top of the form:

- **Official Record Date & Customer:** Select the date and the name of the customer receiving the service.

Service Date    
Customer  

- **Complaint Number:** If this service is a follow-up to a recorded complaint, link it with the relevant Complaint Number.

Complaint No.  

- **Service Fee & Payment Type:** Determine the service fee and select its type, whether it is **Free** or **Service Item Price (Paid)**.

Service Cost    
**Payment Type:**  
 Free  
 Service Item Price

- **Description must be filled:** Describe in detail the service to be provided or the problem being handled.

Description

### Step 3: Detail the Related Goods/Services

Use the tables in the bottom section to detail the items involved in the service process:

- **Goods/Services to be Received:** List the items you receive from the customer to be repaired or serviced. [Item To Be Received](#) [\[+\]](#) [\[-\]](#)
- **Service Item/Part Code:** Specify the type of service or spare parts used during the service process. [Service Item Code](#) [\[+\]](#) [\[-\]](#)
- **Goods/Services to be Sent:** List the items that will be returned to the customer after the service is complete. [Item To Deliver](#) [\[+\]](#) [\[-\]](#)

### Step 4: Save the Service Record

After all data is filled in, use the buttons in the bottom-left section:

- **Save:** To save the service record as a draft.
- **Confirm:** To finalize the service record and move it into the next workflow.

- **Cancel:** To cancel the entry.

## Tips & Important Notes

- Use this module to document all after-sales service activities to have a clear history for each customer.
- Linking a service record with a **Complaint Number** provides an integrated and easily traceable problem-resolution flow from start to finish.
- This module is very important for the **Customer Service team** and the **technical/service team** to ensure all service jobs are recorded and handled properly.

# Service Note Inbox

## Module Guide: Service Note Inbox

### Module Location

CRM > Service Note > Service Note Inbox

### Module Objective

The **Service Note Inbox** module functions as the approval center for all **Service Recording** documents that have been submitted. This module is used by superiors or managers who are authorized to review and provide approval for service records created by the customer service or technical teams.

## 1. Main View (Service Note List)

The main page of this module is an "inbox" that displays all service notes requiring your action.



### View Explanation

This page provides a summary of all service notes that are awaiting approval.

- **Filters:** You can search for a specific service note by **Service Note Number** or a **Date From** and **Date To** range. You can also filter by **Document Filter Status** and **Approval Filter Status**.

- **Request List:** The table below will display all service notes awaiting action. The table currently shows "...No Record...".

## Column Explanation

- **Service Note Number:** The unique number of the submitted Service Recording document.
- **Start Date:** The date the service was started or recorded.
- **Customer:** The name of the customer associated with the service.
- **Status:** An icon indicating the current status of the document.
- **Approval:** An icon indicating the status of the approval process.
- **Approved date:** The date when the approval was given.

## 2. Approval Process Steps

The following is the standard workflow for an approver.

### Step 1: Access the Inbox

Open the **Service Note Inbox** module to see the list of service notes that require approval.

### Step 2: Review the Service Note Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the information that has been input, such as the customer's complaint, the items received, and the service to be provided.

### Step 3: Provide Approval

After you open and review the service note details in Step 2, you will find the buttons to grant approval (e.g., "**Approve**" or "**Reject**" buttons) **within that detail page**. Click the appropriate button to complete the review process.

## 3. Workflow & Integrated Business Process

This module is part of a structured service process workflow.

1. **Submission:** A user (e.g., customer service staff) creates an entry in the **Service Recording** module and clicks **Confirm**.
2. **Entering the Queue:** The confirmed service note automatically enters the queue in this **Service Note Inbox** module.
3. **Review & Approval:** The manager or approver opens this module, selects the service note to be reviewed, opens it, and then provides approval from within the detail page.
4. **Status Update:** After approval, the status on the original document is updated, and the service process can continue.

# Service Sheet

## Module Guide: Service Sheet

### Module Location

CRM > Service Note > Service Sheet

### Module Objective

The **Service Sheet** module is the next step after Service Recording. This module is used to create a work document or "job sheet" that details the technical work that has been performed. If the "Service Recording" is the initial request, then the "Service Sheet" is the record of the execution and completion of that service by the technical team.

## 1. Main View (Service Sheet List)

The main page of this module displays a list of all Service Sheets that have been created.

The screenshot shows the main view of the Service Sheet List module. At the top, there is a breadcrumb trail: CRM | Service Note | Service Sheet. Below this, there is a search bar for 'Service Sheet Number' with a dropdown menu set to '(NONE)'. There are also search and 'Show All' buttons. Below the search bar, there are date filters: 'Date From' set to '1 November 2012' and 'Date To' set to '28 February 2023', with a search button. On the right side, there are two filter status boxes: 'Document Filter Status' and 'Approval Filter Status'. Below these, there is a table header with columns: No., Service Sheet Number, Service Note Number, Customer, Activity Name, Start Date, Status, Approval, and Attachment File. The table body is currently empty, showing 'No Record'.

### View Explanation

This page is the center for viewing and managing all service work sheets.

- **Filters:** You can search for a specific service sheet by **Service Sheet Number** or a **Date From** and **Date To** range.

- **Service Sheet List:** The table below displays a summary of each service sheet, with important columns such as **Service Sheet Number**, **Service Note Number** (showing its link), **Customer**, and **Status**.

## Button Functions

- **New:** The primary button to create a new Service Sheet.

## 2. Steps to Create a New Service Sheet


The following is the complete workflow for creating a Service Sheet.

### Step 1: Create a New Service Sheet

From the Main View, click the **New** button to open the **Add Service Sheet** form. 

### Step 2: Select the Service Note

This is the most important step in this process.

1. On the **Add Service Sheet** form, click the **Pick** button next to the **Service Note Number** field. 
2. The system will display a list of "Service Notes" that have been approved and are ready to be worked on. Select the Service Note that corresponds to the job you are about to perform.

### Step 3: Complete and Save the Service Sheet

1. After the Service Note is selected, the system will likely fill in the customer and service data automatically.

2. Complete any other necessary details (if any), which might include technician's notes, work hours, or spare parts used.
3. Click **Save** to save as a draft or **Confirm** to complete and finalize the Service Sheet.

## Workflow & Integrated Business Process

1. A **Service Note** (Service Recording) is created to record the initial request from the customer.
2. The Service Note is approved via the **Service Note Inbox**.
3. The technical team creates a **Service Sheet** from the approved Service Note to document the details of the work that has been performed.

## Tips & Important Notes

- The Service Sheet is **proof of work**. Ensure you always create it based on a valid "Service Note" via the **Pick** button.
- This module is very important for the **technical or field service team** to report on the work they have completed in detail.
- The data from this Service Sheet can become the **basis for billing** if the service is chargeable.

# Service Sheet Inbox

## Module Guide: Service Sheet Inbox

### Module Location


CRM > Service Recording > Service Sheet Inbox

### Module Objective

The **Service Sheet Inbox** module functions as the approval center for all **Service Sheets** that have been completed and submitted by the technical team. This module is used by a superior or service manager to review and validate the work that has been done before the service is considered officially complete and, if necessary, proceeds to the billing process.

## 1. Main View (Service Sheet List)

The main page of this module is an "inbox" that displays all Service Sheets requiring your action.



The screenshot shows the CRM interface for the Service Sheet Inbox. At the top, there is a breadcrumb trail: CRM | Service Note | Service Sheet Inbox. Below this, there is a search bar for 'Service Sheet Number' with a dropdown menu set to '(NONE)'. There is also a 'Show All' button. Below the search bar, there are date filters: 'Date From' set to '1 November 2012' and 'Date To' set to '28 February 2013', with a 'Search' button. On the right side, there are two filter status buttons: 'Document Filter Status' and 'Approval Filter Status'. Below these filters is a table header with columns: No., Service Sheet Number, Service Note Number, Customer, Activity Name, Start Date, Status, Approval, and Approved date. The table currently shows '...: No Record ...'.

### View Explanation

This page provides a summary of all Service Sheets that are awaiting approval.

- **Filters:** You can search for a specific service sheet by **Service Sheet Number** or a **Date From** and **Date To** range. You can also filter by **Document Filter Status** and **Approval Filter Status**.

- **Request List:** The table below will display all service sheets awaiting action. The table currently shows "...No Record...".

## Column Explanation

- **Service Sheet Number:** The unique number of the submitted Service Sheet document.
- **Service Note Number:** The reference number from the initial Service Recording.
- **Customer:** The name of the customer associated with the service.
- **Status:** An icon indicating the current status of the document.
- **Approval:** An icon indicating the status of the approval process.
- **Approved date:** The date when the approval was given.

## 2. Approval Process Steps

The following is the standard workflow for an approver.

### Step 1: Access the Inbox

Open the **Service Sheet Inbox** module to see the list of completed service jobs that require approval.

### Step 2: Review the Service Sheet Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the information that has been input by the technical team, such as work notes, time spent, or spare parts

used.

### Step 3: Provide Approval

After you open and review the Service Sheet details in Step 2, you will find the buttons to grant approval (e.g., "**Approve**" or "**Reject**" buttons) **within that detail page**. Click the appropriate button to complete the review process.

## 3. Workflow & Integrated Business Process

This module is the final stage in the structured service process workflow.

1. A **Service Note** (Service Recording) is created to record the request.
2. A **Service Sheet** is created by the technical team to document the completed work, and then it is **Confirmed**.
3. The confirmed Service Sheet automatically enters the queue in this **Service Sheet Inbox** module.
4. The service manager reviews and gives final approval.
5. After approval, the service cycle is considered complete and can be forwarded to the **Finance team for billing** if the service is chargeable.

## Tips & Important Notes

- This module is the **final control point** in the service workflow to ensure all work reported by the technical team is valid and appropriate.

- Approval in this module often **triggers the billing process** to the customer.
- Use the status filters to easily see all Service Sheets that are still awaiting your approval.

# Sales Target

## Module Guide: Sales Target

### Module Location

CRM > Sales Target > Sales Target

### Module Objective

The **Sales Target** module serves as a central hub for setting, managing, and monitoring sales targets for various periods, sales groupings, and products. The data input here becomes the basis or reference for all sales performance comparison reports, such as "Target vs. Actual."

## 1. Main View (Sales Target List)

The main page of this module displays a list of all Sales Target documents that have been created.



### View Explanation

This page is for viewing and managing all targets that have been set.

- **Filters:** You can search for a specific target by **Period** or other keywords.
- **Target List:** The table below displays a summary of each target, with columns such as **SalesTargetNumber**, **Period**, **Sales Grouping**, **Status**, and **Approval**.

## Button Functions

- **New:** The primary button to create a new Sales Target.
- **Delete:** To delete a selected target.

## 2. Steps to Manage a Sales Target

The following is the workflow for setting a new target.

### Step 1: Create a New Target

From the Main View, click the **New** button to open the target entry form. 

### Step 2: Fill in Product Sales Target Details

You will be directed to a form to fill in the target details, which can be specific per product.

- **Sales Grouping:** Select the sales group or team whose target is being set (e.g., UMS - Mondelez).

Sales Grouping\* : 

- **Period Code:** Enter the code for the target period, for example, "2025M".

Period Code\* : 

- **Target Value:** Enter the total sales target value in the appropriate currency.

Target Value\* :  

- **File Upload:** You can attach a supporting file if available.

File Upload\* :  

- **Monthly Target Details:** In the detail table below, you can break down the total target into monthly targets. Select the

month from the **Sales Target Month** dropdown and enter the nominal **Amount** for that month.

The screenshot shows a form with two main fields. The first is a dropdown menu labeled 'Sales Target Month' with 'August' selected. The second is an input field labeled 'Amount' with '0' entered. The 'Amount' field is highlighted in blue. Below the dropdown, the text 'August' is visible, and below the input field, the text '0,00' is visible.

### Step 3: Save the Target

After all data is filled in, use the buttons in the bottom-left section:

- **Save:** To save the target as a draft.
- **Confirm:** To finalize and send the target into the approval workflow.
- **Cancel:** To cancel the entry.

## Workflow & Integrated Business Process

- The target data input here will be pulled by the system for performance comparison reports, such as Target vs Actual Sales Stages.
- A target that has been **Confirmed** will likely go to a **Sales Target Inbox** to be approved by management.

## Tips & Important Notes

- Ensure the **Sales Grouping** and **Period** are correct before saving the target.
- This module is the foundation for all sales performance reporting. The accuracy of the data input here is very important.

- Use the detail table to break down annual targets into more easily monitored monthly targets.

# Sales Target Inbox

## Module Guide: Sales Target Inbox

### Module Location

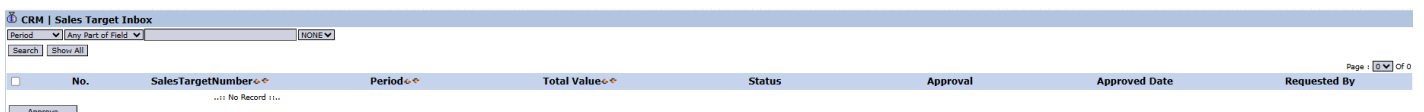
CRM > Sales Target > Sales Target Inbox

### Module Objective

The **Sales Target Inbox** module functions as the approval center for all **Sales Target** documents that have been submitted. This module is used by managers or leaders who are authorized to review and provide final approval for the set targets before they become the official performance benchmark.

## 1. Main View (Target List)

The main page of this module is an "inbox" that displays all Sales Target documents requiring your action.



No.	SalesTargetNumber	Period	Total Value	Status	Approval	Approved Date	Requested By
...No Record...							

### View Explanation

This page provides a summary of all sales targets that are awaiting approval.

- **Filters:** You can search for a specific target by **Period** or other keywords.
- **Request List:** The table below will display all targets awaiting action. The table currently shows "...No Record...".

## Column Explanation

- **SalesTargetNumber:** The unique number of the submitted Sales Target document.
- **Period:** The time period covered by the target.
- **Total Value:** The total value of the submitted target.
- **Status:** An icon indicating the current status of the document.
- **Approval:** An icon indicating the status of the approval process.
- **Approved Date:** The date when the approval was given.
- **Requested By:** The name of the user or employee who submitted the target.

## Button Functions

- **Approve:** The main action button to approve one or more selected sales targets.

## 2. Approval Process Steps

The following is the standard workflow for an approver.

### Step 1: Access the Inbox

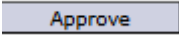
Open the **Sales Target Inbox** module to see the list of targets that require approval.

### Step 2: Review Target Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the details that have been input, such as monthly targets or targets per product.

### Step 3: Provide Approval

After you have reviewed and are certain about the submitted target:

1. Return to the main **Inbox** page.
2. Check the box on the left of one or more target rows you wish to approve.
3. Click the **Approve** button located in the bottom-left section of the page to process the approval. 

## 3. Workflow & Integrated Business Process

This module is part of a structured target-setting process.

1. **Submission:** A user (e.g., a sales team lead) creates a target in the **Sales Target** module and clicks **Confirm**.
2. **Entering the Queue:** The confirmed target automatically enters the queue in this **Sales Target Inbox** module.
3. **Review & Approval:** A manager or sales director opens this module, reviews, and provides approval.
4. **Target Activation:** After approval, the target becomes active and is officially used as the benchmark in performance comparison reports.

# Sales Stage Target Percentage

## Module Guide: Sales Stage Target Percentage

### Module Location

CRM > Sales Stage Target Percentage

### Module Objective

The **Sales Stage Target Percentage** module functions as a configuration tool to set the target distribution of opportunities across each **sales stage** for individual **salespersons (Account Officers)**. The goal is to ensure each salesperson has a healthy and balanced sales pipeline, preventing opportunities from just piling up in the initial or final stages.

## 1. Main View (Target List)

The main page of this module displays a list of the target settings that have been created for each Account Officer.



No.	Account Officer	Sales Stage Target Percentage
...: No Record ...		

### View Explanation

This page is for viewing and managing all existing target percentage settings.

- **Filter:** You can search for the settings for a specific Account Officer using the search bar.

- **Settings List:** The table below displays the Account Officer and a summary of the Sales Stage Target Percentage that has been configured for them.

## Button Functions

- **New:** The primary button to create new target percentage settings for an Account Officer.

## 2. Steps to Set the Target Percentage

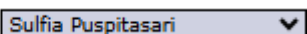
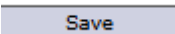
The following is the workflow for setting a new target percentage.

### Step 1: Create New Settings

From the Main View, click the **New** button to open the **New Sales Stage Target** form. 

### Step 2: Select the Account Officer

On the form that appears, select the name of the **Account Officer** (salesperson) from the dropdown whose target you want to set. This field is mandatory (\*). After selecting, click **Save**.

Account Officer \* :  

### Step 3: Fill in the Percentage per Stage

After saving in Step 2, the system will display the next page (not shown in the image) where you can enter the target percentage for each sales stage that exists in the system. Example entry:

- Prospecting: 20%
- Qualification: 30%

- Proposal: 40%
- Negotiation: 10%

## Workflow & Integrated Business Process

The percentage settings you define here will become the benchmark in the **CRM > Target vs Actual Sales Stages** report to compare the actual pipeline composition of each salesperson against their target composition.

## Tips & Important Notes

- Ensure the total percentage of all sales stages for one Account Officer adds up to **100%**.
- This module is a **strategic tool for Sales Managers** to guide their teams in managing the pipeline so it doesn't get stuck in just one stage, thus ensuring a smoother sales flow.
- These settings focus on the **distribution of opportunities**, not on their monetary value.

# Closing Sales Period

## Module Guide: Closing Sales Period

### Module Location

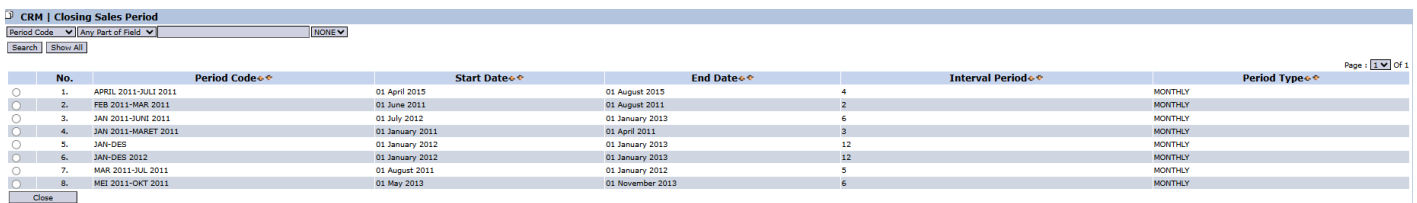
CRM > Closing Sales Period

### Module Objective

The **Closing Sales Period** module is an administrative tool used to officially close a sales period within the system. After a period is closed, sales transactions (such as Opportunities or Activities) within that period generally can no longer be created or modified. This process is important for finalizing data for performance reporting and accurate commission calculations

## 1. Main View (Sales Period List)

The main page of this module displays a list of all sales periods that have been defined in the system.



The screenshot shows the CRM interface for the Closing Sales Period module. At the top, there is a search bar with a dropdown menu for 'Period Code' and a search button. Below the search bar is a table with the following columns: No., Period Code, Start Date, End Date, Interval Period, and Period Type. The table contains 8 rows of data, each representing a sales period. The 'No.' column has radio buttons next to each row. The 'Period Code' column contains codes like 'APRIL 2011-JULY 2011', 'FEB 2011-MAR 2011', etc. The 'Start Date' and 'End Date' columns show the range of the sales period. The 'Interval Period' column shows the number of months between the start and end dates. The 'Period Type' column shows 'MONTHLY' for all periods. At the bottom of the table, there is a 'Close' button.

No.	Period Code	Start Date	End Date	Interval Period	Period Type
<input type="radio"/>	1. APRIL 2011-JULY 2011	01 April 2010	01 August 2010	4	MONTHLY
<input type="radio"/>	2. FEB 2011-MAR 2011	01 June 2011	01 August 2011	2	MONTHLY
<input type="radio"/>	3. JAN 2011-JUNE 2011	01 July 2012	01 January 2013	6	MONTHLY
<input type="radio"/>	4. JAN 2011-MARET 2011	01 January 2011	01 April 2011	3	MONTHLY
<input type="radio"/>	5. JAN-DES	01 January 2012	01 January 2013	12	MONTHLY
<input type="radio"/>	6. JAN-DES 2012	01 January 2012	01 January 2013	12	MONTHLY
<input type="radio"/>	7. MAR 2011-JUL 2011	01 August 2011	01 January 2012	5	MONTHLY
<input type="radio"/>	8. MEI 2011-OKT 2011	01 May 2013	01 November 2013	6	MONTHLY

### View Explanation

This page is the center for performing the period-closing action.

- **Filter:** You can search for a specific period by **Period Code**.
- **Period List:** The table below displays all existing sales periods, with the following details:

- **Period Code:** The unique code for each sales period (e.g., APRIL 2011-JULI 2011, JAN-DES 2012).
- **Start Date:** The start date of the period.
- **End Date:** The end date of the period.
- **Interval Period:** The duration of the period in a specific unit.
- **Period Type:** The type of period, for example, MONTHLY.

## Button Functions

- **Close:** The main action button to run the closing process on the selected period.

## 2. Steps to Close a Sales Period

### Step 1: Access the Module and Select a Period

Open the **Closing Sales Period** module. Find the period you want to close from the list, then select that period by clicking the radio button in the leftmost column of the corresponding row.

<input checked="" type="radio"/>	1. APRIL 2011-JULI 2011
<input type="radio"/>	2. FEB 2011-MAR 2011

### Step 2: Run the Closing Process

After the period is selected, click the **Close** button in the bottom-left section of the page to run the closing process. The system will process and lock that period.

Close

# Tips & Important Notes

- The period closing process is **final**. After a period is closed, you will most likely no longer be able to create or modify sales transactions within that period.
- Before closing a period, ensure all sales transaction data (such as the status of Opportunities and Activities) is **complete and correct**.
- This module is generally only accessed by the **CRM Administrator or Sales Manager** who has the authority to perform period closings.

# Manage Warranty

## Module Guide: Manage Warranty

### Module Location

CRM > Manage Warranty

### Module Objective

The **Manage Warranty** module functions as the data center for viewing, searching for, and managing all product warranty information for items that have been sold to customers. This module is used by the customer service team to verify the warranty status of a product when a customer submits a claim or service request.

## 1. Main View (Warranty List)

The main page of this module displays a list of all product warranty records that exist in the system.



The screenshot shows the 'CRM | Manage Warranty' interface. At the top, there is a search bar with a dropdown menu for 'Document Number' and a 'Search' button. Below the search bar is a table with the following columns: No., Document Number, Item Code, Item Barcode, Item Name, Dimension, Warranty Start Date, and Warranty End Date. The table currently displays '...No Record...'. There is also a 'Page' indicator showing '1 of 0' and an 'Update' button at the bottom left.

### View Explanation

This page is the database for all active and expired warranties.

- **Filter:** You can search for a specific warranty record using the search bar based on **Document Number** or other details.
- **Warranty List:** The table below displays all warranty records that match the filters. The table currently shows "...No Record...".

## Column Explanation

- **Document Number:** The reference document number, most likely the sales invoice number that is the basis for the warranty creation.
- **Item Code / Item Name:** The code and name of the product that has a warranty.
- **Warranty Start Date:** The start date of the warranty period, usually the same as the sales/invoice date.
- **Warranty End Date:** The expiration date of the warranty period.

## Button Functions

- **Update:** The button to update or change selected warranty data.

## 2. Warranty Management Workflow

### 1. Warranty Data Creation (Automatic)

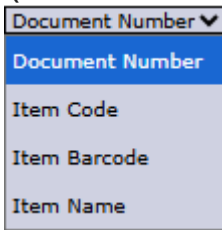
Warranty data is generally **not created manually** in this module. A warranty record is created **automatically** by the system when a product that has a warranty period is sold and its **Sales Invoice** is issued. The invoice date will become the **Warranty Start Date**.


### 2. Searching for Warranty Data

To check the warranty status of a customer's product:

1. Open the **Manage Warranty** module.

2. Use the search bar to find the data by **Document Number** (invoice number), **Item Code**, or **Item Name**.

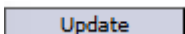


3. Click **Search**. The system will display the warranty details, including its expiration date. 

### 3. Updating Warranty Data

If there is a need to change the data (for example, due to a warranty extension program):

1. Search for and find the warranty record to be changed.
2. Select that record by checking the box in the leftmost column.
3. Click the **Update** button to open the editing form and make the changes.



## Tips & Important Notes

- This module is the primary source of information for the **Customer Service team** to validate warranty claims from customers quickly and accurately.
- Ensure the **product master data** has been set up with the correct warranty period so that the records automatically created by the system are valid.

- The **Warranty End Date** column is the key piece of information for determining whether a customer's product is still under warranty or not.

# Campaign List

## Module Guide: Campaign List

### Module Location

CRM > Campaign Management > Campaign List

### Module Objective

The **Campaign List** module functions as the central hub for planning, budgeting, executing, and monitoring all marketing campaigns or promotional events. This module allows you to define event details, assign responsible persons, and track its budget and actual realized costs.

## 1. Main View (Campaign List)

The main page of this module displays a list of all promotional events or campaigns that have been created.



No.	Campaign Code	Campaign Name	Location	Start Date	End Date	Total Budget	Total Expenses
1	CM001	Festival Food	Gresik	05-Feb-2013	07-Feb-2013	IDR 200,000.00	IDR 250,000.00

### View Explanation

This page provides a general overview of all ongoing or completed campaigns.

- **Filters:** You can search for a specific campaign by **Campaign Code** or a **Date From** and **Date To** range.
- **Campaign List:** The table below displays a summary of each campaign. There is one example of a "Festival Food"

campaign in Gresik.

## Column Explanation

- **Campaign Code:** The unique code for each promotional event.
- **Campaign Name:** The name of the promotional event.
- **Location:** The location where the event is held.
- **Start Date / End Date:** The start and end dates of the event.
- **Total Budget:** The total budget allocated for the event.
- **Total Expenses:** The total actual costs that have been incurred for the event.

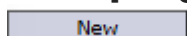
## Button Functions

- **New:** The primary button to create new promotional event data.
- **Print:** To print the details of a selected event.
- **Delete:** To delete a selected event.

## 2. Steps to Create a New Promotional Event

### Step 1: Create a New Campaign

From the Main View, click the **New** button to open the **Add Campaign** form.



## Step 2: Fill in Campaign Details

Fill in all the relevant information on the form that appears. Fields marked with (\*) are mandatory.

- **Campaign Name, Description, Start Date, End Date, Location:** Fill in all the basic details about the promotional event.

Campaign Name *	:	<input type="text"/>
Description	:	<input type="text"/>
Start Date	:	<input type="text" value="1 November 2012"/> 
End Date	:	<input type="text" value="28 February 2013"/> 
Location *	:	<input type="text"/>

- **Campaign Manager & Campaign Staff:** Assign the manager and staff responsible for the event's execution by clicking **[+] Add Person**.

Campaign Manager	:	<input type="checkbox"/> Employee Code Employee Name
------------------	---	--

[\[+\] Add Person](#) [\[-\] Remove Person](#)

- **Budget:** Link the campaign with its allocated budget. Click **[+] Add Row** to add the **Budget Code** and **Budget Amount** details.

Budget	:	<input type="checkbox"/> Budget Code Budget Name Currency Budget Amount
--------	---	---

[\[+\] Add Row](#) [\[-\] Delete Row](#)

## Step 3: Save the Campaign

After all details are filled in, click the **Save** button to save the new promotional event data.

## Tips & Important Notes

- Use this module for all promotional activities so that their expenses and effectiveness can be tracked centrally.

- Monitor the **Total Budget vs. Total Expenses** columns on the main page to ensure event spending does not exceed the budget.
- For the **Total Expenses** column to be populated automatically, ensure that all costs related to this promotion are correctly allocated to the corresponding **Campaign Code** in other modules (e.g., when recording a purchase invoice for the venue rental fee).

# Activity History Report

## Report Module Guide: Activity History Report

### Module Location

CRM > CRM Report > Activity History Report

### Module Objective

The **Activity History Report** module is used to generate a report containing the history or a list of all activities (such as meetings, phone calls, tasks) that have been recorded in the Activity Module. This report is very useful for managers to monitor the productivity of the sales team and for the sales team to review the interactions they have had with customers.

## 1. Report Parameters

The main page of this module is a form containing various parameters to customize the report that will be generated.

**CRM | CRM Report | Activity History Report**

Company : PT. UNGGUL INDO MODERN SEJAHTERA

Criteria : All

Display :  Report  Calendar

Location : All

Status : All

From : 1 August 2025

To : 1 August 2025

Here is an explanation for each parameter:

- **Criteria:**

- Use this dropdown to filter the report by specific criteria, most likely such as per Salesperson, per Customer, or per Activity Type.

### • **Display:**

- Choose the display format you want for the report.
- **Report:** Displays the data in a standard list or table format.
- **Calendar:** Displays the data in a visual calendar format.

### • **Location / Status:**

- Filter the report by the location or the status of the activities (for example, to only display activities that are "Done" or completed).



### • **From / To:**

- Specify the **From** and **To** date range to define the report's period (e.g., August 1, 2025).

## 2. Steps to Generate the Report

### Step 1: Set Report Parameters

Select all the parameters you need, especially defining the date range and other criteria to get the specific data you want.

Company	:	PT. UNGGUL INDO MODERN SEJAHTERA
Criteria	:	All ▼
Display	:	<input checked="" type="radio"/> Report <input type="radio"/> Calendar
Location	:	All ▼
Status	:	All ▼
From	:	1 August 2025 
To	:	1 August 2025 

## Step 2: Generate the Report

After all parameters are set, click one of the two buttons in the bottom-left section of the page:

- **Display Report:** To preview the activity report directly on your screen.

Display Report

- **Export To MS Excel:** To download the report data in an Excel file format.

Export To MS Excel

## Tips & Important Notes

- This report is an excellent tool for **Sales Managers** to monitor the quantity and type of activities performed by each member of their team.
- Use the **Calendar** format to get a visualization of the schedule of past activities within a period.
- The accuracy of this report is highly dependent on the **Sales team's discipline** in routinely recording all of their activities in the Activity Module.

# Current Sales Stage

## Report Module Guide: Current Sales Stage

### Module Location

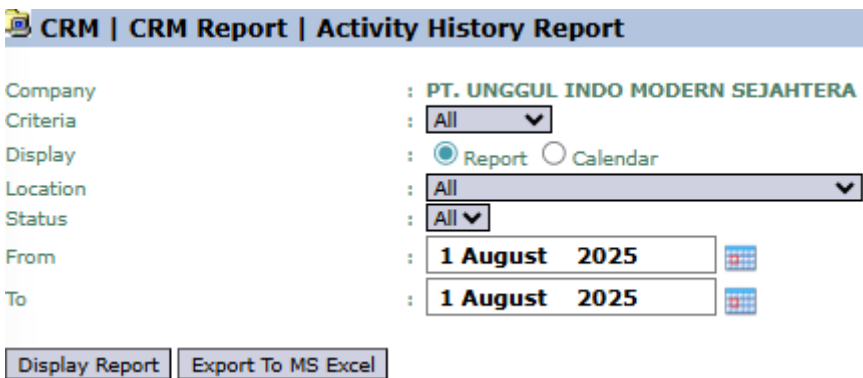
CRM > CRM Report > Current Sales Stage

### Module Objective

The **Current Sales Stage** report module is used to generate a report that provides a current overview or snapshot of the sales pipeline. This report displays a list of all existing opportunities and shows which stage each of those opportunities is currently in. This is an important tool for sales forecasting and managing the overall health of the pipeline.

## 1. Report Parameters

The main page of this module is a form containing various parameters to customize the report that will be generated.



The screenshot shows a form titled "CRM | CRM Report | Activity History Report". The form contains the following parameters:

- Company: PT. UNGGUL INDO MODERN SEJAHTERA
- Criteria: All (dropdown menu)
- Display: Report (selected radio button), Calendar (unselected radio button)
- Location: All (dropdown menu)
- Status: All (dropdown menu)
- From: 1 August 2025 (calendar icon)
- To: 1 August 2025 (calendar icon)

At the bottom of the form, there are two buttons: "Display Report" and "Export To MS Excel".

Here is an explanation for each parameter:

- **Account Officer:**

- Use this dropdown to filter the report to show the pipeline for all salespeople (-- All --) or for a specific selected salesperson.

- **Opportunity:**

- Use this field to search for and display data for one specific opportunity.

- **Status:**

- Filter opportunities by their status, for example, to only display those that are still "**Open**", "**Won**", or "**Lost**".

- **Change Date:**

- Specify a **To** date range to see opportunities whose status changed within that period (e.g., up to August 31, 2025).

## 2. Steps to Generate the Report

### Step 1: Set Report Parameters

Select all the parameters you need to focus the report. For example, select a specific **Account Officer** and the "**Open**" **Status** to see all active deals for that salesperson.

Status : | -- None -- ▼ | Account Officer : | -- All -- ▼ |

### Step 2: Generate the Report

After all parameters are set, click one of the two buttons in the bottom-left section of the page:

- **Display Report:** To preview the report directly on your screen.

Display Report

- **Export To MS Excel:** To download the report data in an Excel file format.

Export To MS Excel

## Tips & Important Notes

- This report is a primary tool for **Sales Managers** to get a quick overview of the entire ongoing sales pipeline.
- Use the **Status** filter and select "**Open**" to see all active deals that still have the potential to be won.
- The accuracy of this report is highly dependent on the **Sales team's discipline** in updating the **Sales Stage** in the Opportunity Module whenever there is progress.

# Performance Each Account Officer

## Report Module Guide: Performance Each AO

### Module Location

CRM > CRM Report > Performance Each AO



### Module Objective

The **Performance Each AO** (Account Officer) report module is used to generate a report that analyzes the performance of each salesperson. This report summarizes their activities and work results based on the opportunity data they manage. It is an important tool for sales managers to conduct evaluations, provide coaching, and measure team achievements.

## 1. Report Parameters

The main page of this module is a form containing various parameters to customize the performance report that will be generated.

**CRM | CRM Report | Performance Each AO**

Account Officer	:	<input checked="" type="radio"/> All <input type="radio"/> Selected
Opportunities Created From	:	<input type="text" value="1 August 2025"/>  To <input type="text" value="1 August 2025"/> 
Sales Stage In	:	<input checked="" type="radio"/> All <input type="radio"/> Selected
Opportunity Status In	:	<input checked="" type="radio"/> All <input type="radio"/> Selected

Here is an explanation for each parameter:

- **Account Officer:**

- Select **All** to display the performance report for all salespeople, or select **Selected** to choose one or more specific salespeople to be evaluated.

- **Opportunities Created From / To:**

- Specify the opportunity creation date range to define the performance evaluation period (e.g., August 1, 2025).

- **Sales Stage In:**

- Filter the report to only display opportunities that are in a specific sales stage. Select **All** to include all stages.

- **Opportunity Status In:**

- Filter the report based on the final status of the opportunities. For example, select "**Won**" to see the win-rate, or "**Lost**" to see failed opportunities. Select **All** to include all statuses.

## 2. Steps to Generate the Report

### Step 1: Set Report Parameters

Select all the parameters you need to focus the report. For example, to see a salesperson's winning performance last month, select the **Account Officer's** name, set the date range to the previous month, and set the **Opportunity Status In** to "**All**".

Account Officer :  All  Selected

Opportunities Created From :  To

Sales Stage In :  All  Selected

Opportunity Status In :  All  Selected

## Step 2: Generate the Report

After all parameters are set, click one of the two buttons in the bottom-left section of the page:

- **Display Report:** To preview the performance report directly on your screen.
- **Export To MS Excel:** To download the report data in an Excel file format.

## Tips & Important Notes

- This report is a primary evaluation tool for **Sales Managers** to objectively assess the performance of each member of their team based on data.
- To see how many deals a salesperson won in a specific period, set the date range and filter the **Opportunity Status In** to "**Won**".
- The accuracy of this report is highly dependent on the salesperson's discipline in managing data in the **Opportunity Module**, especially in updating its status to "**Won**" or "**Lost**" when a deal is concluded.



# Sales Product Target

## Report Module Guide: Sales Stage Target vs Actual

### Module Location

CRM > CRM Report > Sales Product Target

### Module Objective

The **Sales Product Target** module is used to generate a report that compares the actual composition of a salesperson's sales pipeline with the percentage targets that have been set for them. This report is a managerial tool for evaluating whether a salesperson's pipeline is healthy and balanced, or clustered in specific stages.

## 1. Report Parameters

The main page of this module is a form containing various parameters to customize the report that will be generated.

The screenshot shows a form titled "CRM | CRM Report | Sales Stage Target vs Actual". It contains two rows of radio button options. The first row is for "Account Officer" with options "All Account Officer" (selected) and "Selected Account Officer". The second row is for "Opportunity Status In" with options "All Status" (selected) and "Selected Status". At the bottom, there are two buttons: "Display Report" and "Export To MS Excel".

Here is an explanation for each parameter:

- **Account Officer:**

- Select **All Account Officer** to display the comparison report for all salespeople.

- Select **Selected Account Officer** to choose one or more specific salespeople to be evaluated.

- **Opportunity Status In:**

- Filter opportunities by their status.
- Select **All Status** to include all opportunities.
- Select **Selected Status** to filter by a specific status (the most common choice is selecting the "**Open**" status to analyze the active pipeline).

## 2. Steps to Generate the Report

### Step 1: Set Report Parameters

Select the **Account Officer** and **Opportunity Status In** that you wish to analyze.

Account Officer	:	<input checked="" type="radio"/> All Account Officer	<input type="radio"/> Selected Account Officer
Opportunity Status In	:	<input checked="" type="radio"/> All Status	<input type="radio"/> Selected Status

### Step 2: Generate the Report

After all parameters are set, click one of the two buttons in the bottom-left section of the page:

- **Display Report:** To preview the comparison report directly on your screen.

Display Report

- **Export To MS Excel:** To download the report data in an Excel file format.

Export To MS Excel

### 3. Workflow & Integrated Business Process

This report is the culmination of several processes in the CRM modules:

1. **Target Setting:** A manager first sets the percentage targets in the **Sales Stage Target Percentage** module.
2. **Sales Activity:** The Sales team manages and updates the sales stage of each deal in the **Opportunity** module.
3. **Performance Analysis:** The manager uses this report (**Sales Stage Target vs Actual**) to compare the actual data from the Opportunity module with the targets that have been set.

### Tips & Important Notes

- This report is used to answer questions like, "Is salesperson A's pipeline too heavy in the early stages and lacking in the negotiation stage according to their target?"
- To ensure this report can display a valid comparison, make sure the percentage targets have been set first in the **Sales Stage Target Percentage** module.
- This is a good **coaching tool** for Sales Managers to help their teams proactively manage their pipelines and ensure a healthy deal flow.

# Campaign Report

## Report Module Guide: Campaign Report

### Module Location

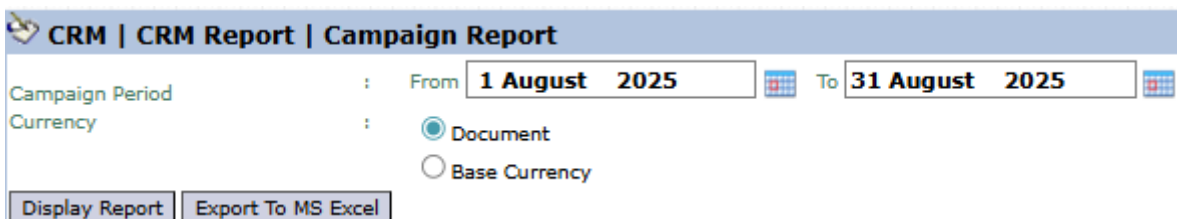
CRM > CRM Report > Campaign Report

### Module Objective

The **Campaign Report** module is used to generate a report that summarizes all marketing campaigns or promotional events based on a specific time period. This report is used to review promotional activities that have been or are currently running, including a summary of their budgets and costs.

## 1. Report Parameters

The main page of this module is a simple form containing several parameters to customize the report that will be generated.



The screenshot shows a web form titled "CRM | CRM Report | Campaign Report". It contains two main sections: "Campaign Period" and "Currency". The "Campaign Period" section has a "From" date field set to "1 August 2025" and a "To" date field set to "31 August 2025", both with calendar icons. The "Currency" section has two radio button options: "Document" (which is selected) and "Base Currency". At the bottom of the form, there are two buttons: "Display Report" and "Export To MS Excel".

Here is an explanation for each parameter:

- **Campaign Period:**

- Specify the **From** and **To** date range to display all campaigns that were active within that period (e.g., August 1, 2025, to August 31, 2025).

## • **Currency:**

- Choose how currency values will be displayed in the report.
- **Document:** Displays values in the original currency used when creating the campaign document.
- **Base Currency:** Converts all values to the company's base currency.

## 2. Steps to Generate the Report

### Step 1: Set Report Parameters

Define the **Campaign Period** range and select the **Currency** option you want.

Campaign Period : From  To

Currency :  Document  
 Base Currency

### Step 2: Generate the Report

After all parameters are set, click one of the two buttons in the bottom-left section of the page:

- **Display Report:** To preview the campaign report directly on your screen.

- **Export To MS Excel:** To download the report data in an Excel file format.

## Workflow & Integrated Business Process

This report pulls its data from the **Campaign Management Module**. To get an accurate report, ensure all campaign details, especially budgets and cost allocations, have been entered correctly.

## **Tips & Important Notes**

- Use this report at the end of each month to review all promotional activities that have taken place.
- This report is an effective tool for the **Marketing and Sales teams** to measure the **Return on Investment (ROI)** of the promotional activities they have conducted.

# Campaign Budget Expenses

## Report Module Guide: Campaign Budget Expense

### Module Location

CRM > CRM Report > Campaign Budget Expense

### Module Objective

The **Campaign Budget Expense** report module is used to generate a financial report that specifically compares the allocated **Budget** with the **Actual Expense** that has been incurred for a promotional event. This report is a financial control tool for monitoring and analyzing the effectiveness of the use of promotional funds.

## 1. Report Parameters

The main page of this module is a simple form containing several parameters to customize the report that will be generated.



The screenshot shows the 'Campaign Budget Expense' report form. The breadcrumb trail at the top reads 'CRM | CRM Report | Campaign Budget Expense'. The form contains the following fields and options:

- Campaign Period:** A date range selector with 'From' set to '1 August 2025' and 'To' set to '31 August 2025'. Both date fields have a calendar icon to their right.
- Currency:** A radio button selection with 'Document' selected (indicated by a blue dot) and 'Base Currency' unselected.
- Buttons:** Two buttons at the bottom: 'Display Report' and 'Export To MS Excel'.

Here is an explanation for each parameter:

- **Campaign Period:**

- Specify the **From** and **To** date range to display all campaigns that were active within that period (e.g.,

August 1, 2025, to August 31, 2025).

### • **Currency:**

- Choose how currency values will be displayed in the report.
- **Document:** Displays values in the original currency used when creating the campaign document.
- **Base Currency:** Converts all values to the company's base currency.

## 2. Steps to Generate the Report

### Step 1: Set Report Parameters

Define the **Campaign Period** range and select the **Currency** option you want.



The screenshot shows a form with two rows. The first row is labeled 'Campaign Period' and has a 'From' field with the date '1 August 2025' and a 'To' field with the date '31 August 2025'. Both date fields have calendar icons to their right. The second row is labeled 'Currency' and has two radio button options: 'Document' (which is selected) and 'Base Currency'.

### Step 2: Generate the Report

After all parameters are set, click one of the two buttons in the bottom-left section of the page:

- **Display Report:** To preview the comparison report directly on your screen.

[Display Report](#)

- **Export To MS Excel:** To download the report data in an Excel file format.

[Export To MS Excel](#)

## Workflow & Integrated Business Process

This report pulls budget data from the **Campaign Management Module** and actual cost data from accounting modules (e.g., Purchase Invoice).

To get an accurate report, ensure that all costs related to a promotion have been correctly allocated to the appropriate **Campaign Code** when they are recorded.

## Tips & Important Notes

- Use this report to perform tight **financial control** over every promotional event that is run.
- This report helps the **Marketing and Finance teams** to analyze the effectiveness of promotional budget spending and to calculate **Return on Investment (ROI)**.