

Sales Program

Module Guide: Sales Program

Module Location

Sales > Sales Program

Module Objective

The **Sales Program** module is used to create a high-level sales program or cooperation agreement with a customer. This document defines various agreed-upon commercial terms, such as targets, discounts, credit limits, and payment terms for a specific period.

Note: This module has a very similar function and appearance to the **Memorandum of Understanding (MOU)** module.

1. Main View (Program List)

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

The screenshot shows the main view of the Sales Program module. At the top, there is a navigation bar with 'Sales | Program | Program'. Below this, there are several filter sections: 'MOU Number' with a dropdown menu set to 'Any Part of Field' and a search box containing 'NONE'; 'Item Category' set to 'FINISHED GOOD' and 'Status' set to 'All'; 'Date From' set to '1 August 2025' and 'Date To' set to '31 August 2025'. There are also 'Document Filter Status' and 'Approval Filter Status' sections. Below the filters, there is a table header with columns: 'No.', 'Program Number', 'Program Date', 'Customer Name', 'Regional', 'Product', 'Target', 'Bank Guarantee', 'Credit Limit', 'Document Status', 'Approval Status', 'Attachment File', and 'Status'. The table currently shows '...: No Record Found :...'. At the bottom, there are buttons for 'New', 'Print', and 'Change Status'.

View Explanation & Filters

This page is for viewing and managing all existing programs.

- **Filters:** You can search for a specific program by **MOU Number**, **Item Category**, **Status**, or a date range (**Date From / Date To**).
- **Program List:** The table below will display a summary of each program, with columns such as **Program Number**, **Customer Name**, **Target**, and **Credit Limit**.

Button Functions


- **New:** The primary button to create a new Sales Program.
- **Print:** To print the details of a selected program.
- **Change Status:** To change the status of a selected program.

2. Steps to Create a New Sales Program



Step 1: Create a New Program

From the Main View, click the **New** button to open the new program creation form. 

Step 2: Fill in Program Details

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

- **Basic Information:**
 - The **MOU Number** will be filled automatically. Fill in the **MOU Date** (Program Date), select the **Customer**, **Regional**, and the **Product** covered by this program.

MOU Date *	:	5 August 2025	
Customer *	:	<input type="text"/>	
Regional *	:	<input type="text"/>	
Product *	:	<input type="text"/>	

• Commercial Terms:

- Complete all agreed-upon commercial requirements such as **Discount**, **Payment Term**, **Return**, **Target**, **Bank Guarantee**, and **Credit Limit**.

Payment Term *	:	<input type="text" value="None"/>
Return *	:	<input type="radio"/> Open Return <input type="text" value="3"/> % <input type="radio"/> Return Allowance <input type="text" value="1"/> %
Target *	:	<input type="text" value="0.00"/>
Bank Guarantee *	:	<input type="checkbox"/> Yes
Credit Limit *	:	<input type="text" value="0.00"/>

Step 3: Save and Confirm

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

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

Tips & Important Notes

- The program created here will become the master agreement that governs the terms of transactions with the selected customer during the program's period.
- Ensure all commercial terms such as **Credit Limit** and **Payment Term** are filled in accurately, as the system will

likely use this data for automatic validation of sales transactions.

- A program that has been **Confirmed** will likely go to a **Sales Program Inbox** for further approval by management.

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