Sales Performance Monitoring

for

PT Tri Energi Berkarya

Demo:

https://poc-crm.diasoft.web.id/
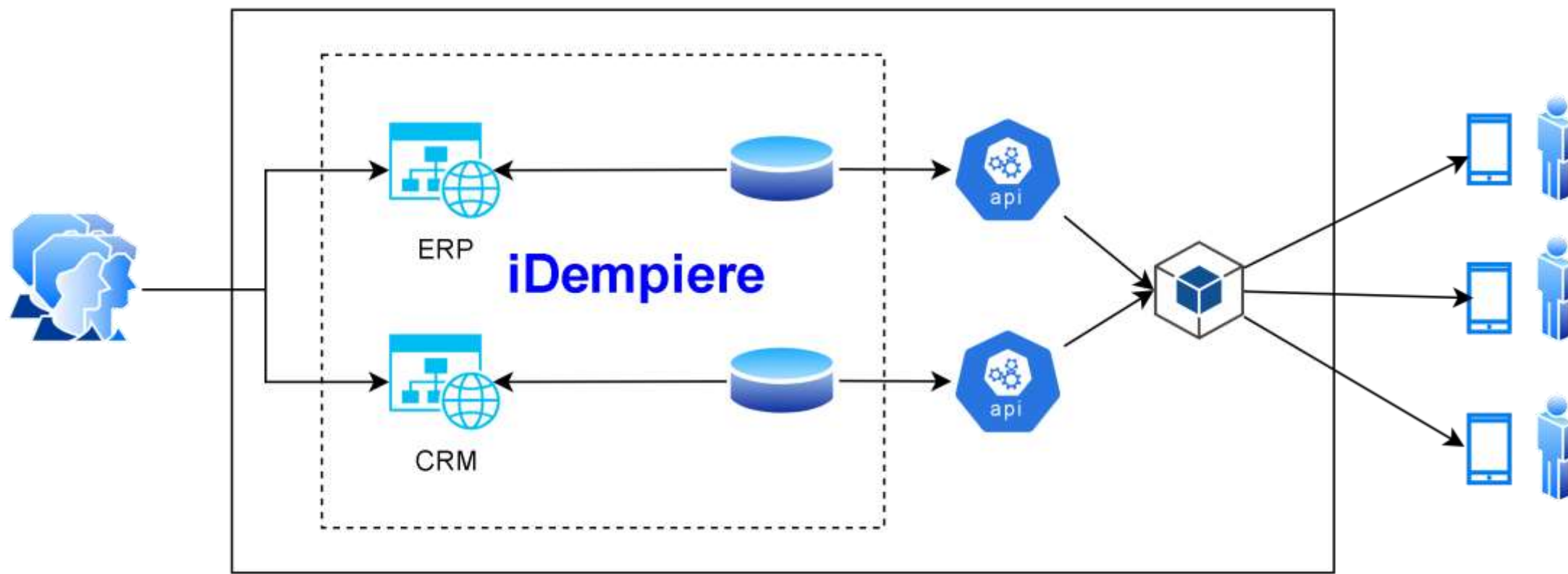
Purpose
Sales Performance Monitoring

Monitoring and evaluating sales activities and performance of both teams and individuals.
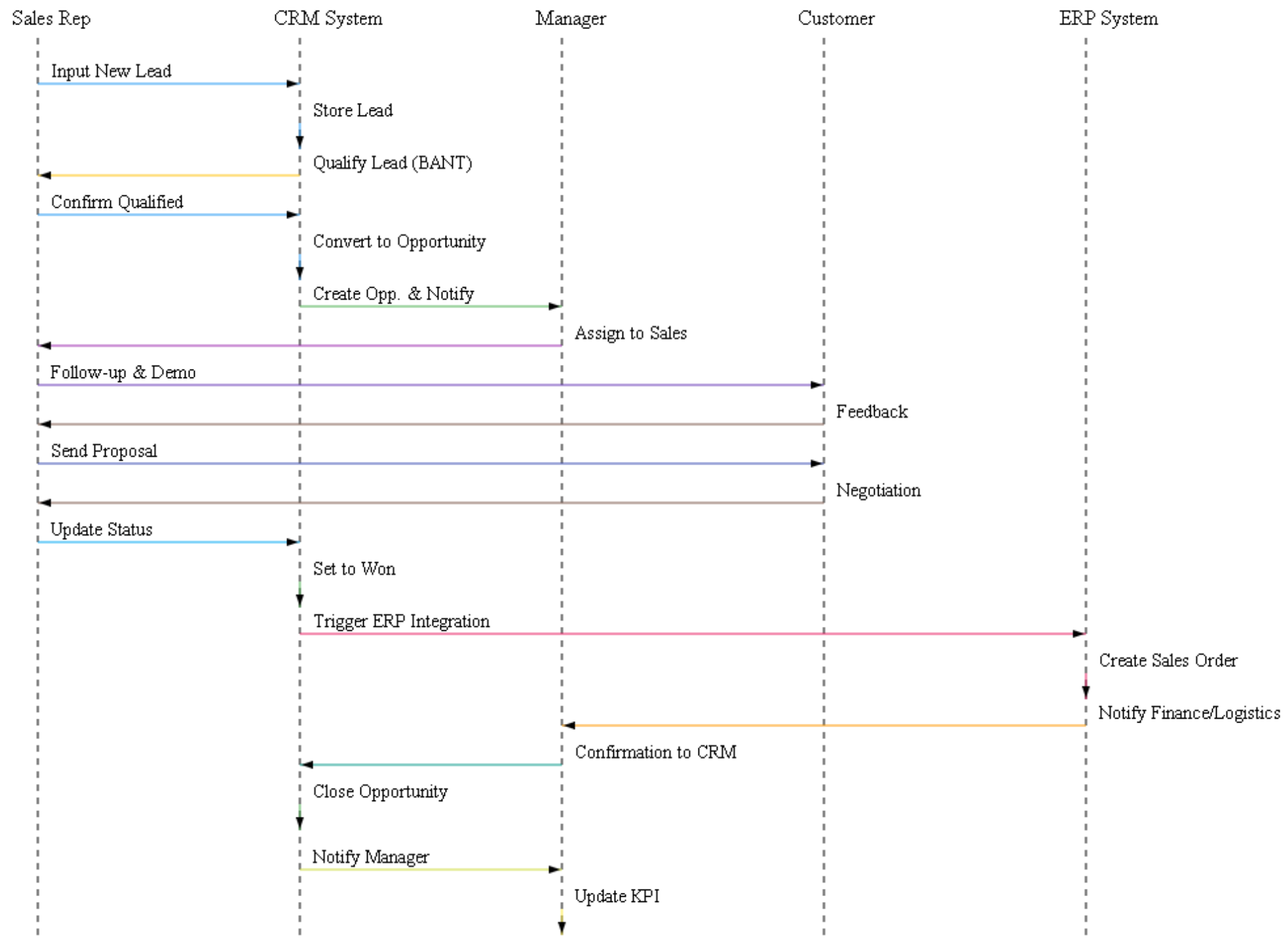
Enhancing visibility into the sales pipeline, sales processes, and delivery.

Providing strategic insights to support decision-making by managers or executives.

Integrated with ERP (iDempiere), and if needed, with external or internal CRM systems.

Architecture Sales Performance & Monitoring System

Sales Rep — CRM System — Manager — Customer — ERP System

- Sales Rep → CRM System: Input New Lead
- CRM System: Store Lead
- CRM System → Sales Rep: Qualify Lead (BANT)
- Sales Rep → CRM System: Confirm Qualified
- CRM System: Convert to Opportunity
- CRM System → Manager: Create Opp. & Notify
- Manager → Sales Rep: Assign to Sales
- Sales Rep → Customer: Follow-up & Demo
- Customer → Sales Rep: Feedback
- Sales Rep → Customer: Send Proposal
- Customer → Sales Rep: Negotiation
- Sales Rep → CRM System: Update Status
- CRM System: Set to Won
- CRM System → ERP System: Trigger ERP Integration
- ERP System: Create Sales Order
- ERP System → Manager: Notify Finance/Logistics
- Manager → CRM System: Confirmation to CRM
- CRM System: Close Opportunity
- CRM System → Manager: Notify Manager
- Manager: Update KPI

Roles

Sales
- Sales Activity Performance, Sales Performance, Leads Management, Account Management, Activity Management, Kanban Pre-Won, Kanban Implementation

Manager
- Team Activity Performance, Team Sales Performance, Kanban Pre-Won, Kanban Implementation,
- Dashboard: Team Report, Target Realization, Forecast

Technician
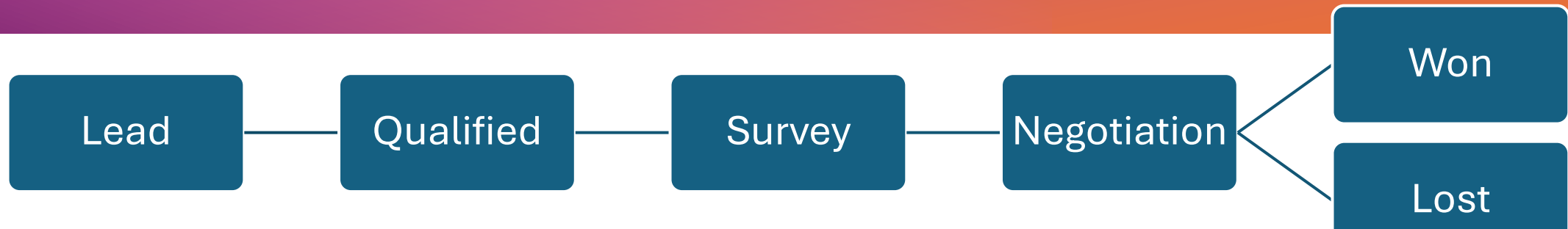- Kanban Implementation
- Work Order, Testing, Troubleshooting

Admin
- Sync Master Product, Role & User

Executive
- Executive Dashboard
- Forecast Global

Kanban – Pre Win (Sales Pipeline)

Lead — Qualified — Survey — Negotiation — Won / Lost

Sales Kanban Board

Gunakan tampilan Kanban ini untuk memonitor dan memindahkan leads antar tahapan proses penjualan.

+Add Lead

Lead	Qualified	Survey	Negotiation	Won	Lost
Lead 1 Perusahaan A	**Lead 3** Perusahaan C	**Lead 6** Perusahaan F	**Lead 4** Perusahaan D	**Lead 7** Perusahaan G	**Lead 5** Perusahaan E
Lead 2 Perusahaan B					

Transaction Type

New Installation

Repeat Order

Sparepart Replacement

Troubleshooting

Periodic Maintenance

Kanban Post Win/Implementation

New Installation	Work Order	Preparation	Ready to Go	In Progress	Testing	Done
Repeat Order	Work Order	Preparation	Ready to Go	In Progress	Testing	Done
SparePart Replacement	Work Order	Preparation	Ready to Go	In Progress	Testing	Done
Trouble-shooting	Work Orde	Preparation	Ready to Go	In Progress	Testing	Done
Periodic Maintenance	Work Orde	Preparation	Ready to Go	In Progress	Testing	Done

Kanban Post Win/Implementation

| Work Order | Preparation | Ready to Go | In Progress | Testing | Done |

Delivery Kanban Board

Gunakan tampilan Kanban ini untuk memonitor dan memindahkan customer antar tahapan proses penjualan.

+ Add Lead

Work Order	Preparation	Ready to Go	In Progress	Testing	Done
Lead 1 Perusahaan A	**Lead 3** Perusahaan C	**Lead 4** Perusahaan D	**Lead 2** Perusahaan B	**Lead 6** Perusahaan F	**Lead 7** Perusahaan G
			Lead 5 Perusahaan E		

+ Calendar Activity

Activity Title	Date
	14/05/2025

Add Activity

Min	Sen	Sel	Rab	Kam	Jum	Sab
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24

Sales Executive

- Dashboard
  - Individual Sales Activity Performance
  - Individual Sales Performance
  - Kanban Sales
  - Kanban Post Sales (Implementation/Delivery)
- Form Entry
  - Lead Management
  - Account Management
  - Activity Management

Dashboard Individual Sales Activity Performance

Feature	Description
Individual Lead Number to Lead Target	Shows the ratio of actual leads generated by a sales executive against their assigned target.
Individual Qualified Lead to Lead Number	Displays the percentage of leads that have been qualified (i.e., meet criteria) out of the total leads handled by the individual.
Deal Closed to Target	Measures the number of deals successfully closed compared to the target set for the sales executive.
Number of Current Activity	Lists the count of ongoing or active sales activities (calls, meetings, demos, etc.) for the individual.
Lead Stage Distribution	Visualizes the number of leads in each stage of the sales funnel (e.g., new, contacted, proposal, closed).
Weekly Lead Movement	Tracks the progress and changes in lead statuses on a weekly basis to highlight momentum or stagnation.
Individual Activity Distribution	Breaks down the types of activities (e.g., calls, emails, site visits) performed by the executive over a period.
Activity by Weeks	Displays weekly trends of total activities carried out, supporting performance tracking and planning.
Activity Plan Overview	Provides a summary of planned versus actual activities, aiding in schedule adherence and planning.

Dashboard Individual Sales Performance

Feature	Description
Omzet This Month	Displays the current month's revenue with a "More" button to see full details.
Cumulative Omzet This Month	Shows the running total revenue for the current month with a "More" button.
Total Omzet This Month	Shows the aggregated revenue total with a "More" button.
Omzet/Target Ratio This Month	Displays the ratio or percentage of omzet achieved against the monthly target, with a "More" button.
8-Week Line Chart	A line chart visualizing the weekly trend for Omzet, Cumulative Omzet, and Target over the last 8 weeks.
Pie Chart – Total Win by Status	Pie chart showing distribution of deals by status: Preparation, In Progress, Done.
Bar Chart – Revenue by Status	Bar chart showing revenue contribution per deal status category.
Deal List Table	A searchable list of deals showing Deal Name, Status, and Revenue. Includes a "More" button.

Kanban Sales Pipeline

Feature	Description
Add New Lead Button	A button allows adding a new lead via a full-screen dialog
Stage Definitions	Lead, Qualified, Survey, Negotiation, Won, Lost
Visual Kanban Columns	Renders each stage as a vertical Kanban column using Bootstrap grid
Card Display per Lead	Each lead appears as a task card with Name, Company, and Status
Drag & Drop Lead Movement	Integrates with JavaScript (kanbanInterop.initSortable) to enable dragging cards between stages
Interactive Lead Stage Update	When a lead is moved, a dialog (ComQualification) prompts confirmation or additional input.
Dialog-Based Interaction	Uses dialogs for both qualification and lead creation steps
Inline Help Text	Explains the use of Kanban board depending on the pipeline type (sales vs customer process)
Responsive Layout	Uses Bootstrap classes for mobile responsiveness in displaying Kanban columns

Kanban Delivery/Implementation Pipeline

Feature	Description
Add New Lead Button	A button allows adding a new lead via a full-screen dialog
Stage Definitions	Work Order, Preparation, Ready to Go, In Progress, Testing, Done
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Sales Team Lead/ Manager

- Dashboard
  - Individual Sales Activity Performance
  - Individual Sales Performance
  - Kanban Sales
  - Kanban Post Sales (Implementation/ Delivery)
  - Calendar Activity

Dashboard Sales Activity Performance (By Month, Salesperson, Region, Channel, Product/Service, Customer Type)

Feature	Description
Team Lead Number to Team Target	Displays the total number of leads generated by the entire sales team compared to the collective lead target.
Team Qualified Lead Ratio	Shows the percentage of qualified leads (across all team members) out of total leads generated.
Team Deal Closed to Target	Tracks the number of deals closed by the team against their shared sales target.
Total Team Activities	Summarizes all ongoing sales activities performed by team members.
Lead Stage Funnel – Team View	Visualizes how leads are distributed across sales stages for the whole team. Useful to spot bottlenecks.
Weekly Team Lead Movement	Provides weekly trends and movement of team-managed leads, reflecting team dynamics and responsiveness.
Activity Distribution by Member	Breaks down and compares activity types across team members for performance evaluation.
Weekly Activity Trends (Team)	Shows overall team activity trends over time, helping leaders track consistency and identify peak effort weeks.
Planned vs. Actual (Team Overview)	Highlights planned activities versus completed ones for the team, aiding in gap analysis and forecasting.

Dashboard Individual Sales Performance (By Month, Salesperson, Region, Channel, Product/Service, Customer Type)

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Technician

- Dashboard
  - Kanban Post Sales (Implementation/ Delivery)
  - Calendar Activity

Executive

- Dashboard
  - Individual Sales Activity Performance
  - Individual Sales Performance
  - Kanban Sales
  - Kanban Post Sales (Implementation/ Delivery)
  - Calendar Activity
- Executive Dashboard
  - Global KPIs: Revenue, Target, Deal Closed
  - Customer & Regional Segmentation
  - Revenue Forecast
  - Top-Selling Product & Transaction Type Evaluation
  - Role-Based Read-Only View for EXECUTIVE