

Nama : Melati Yulvira Salsabila (171402007)  
Tria Riskiani (171402016)  
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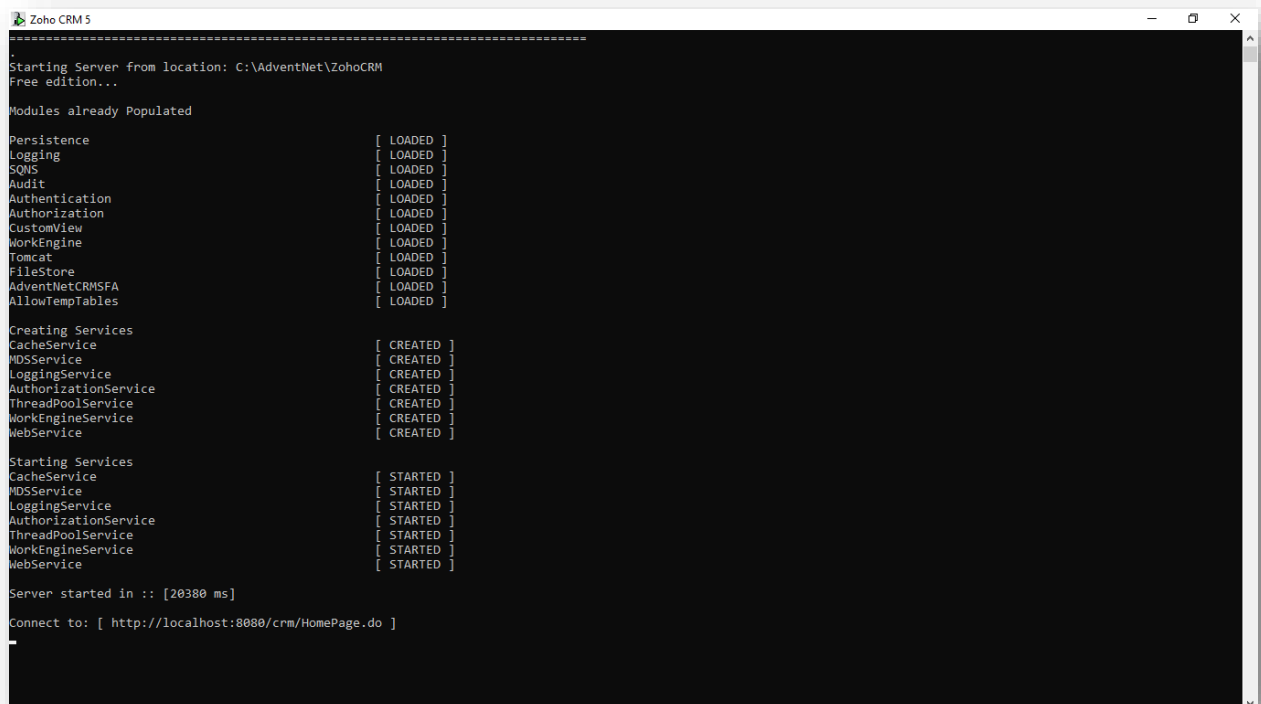
Kom : A

Mata Kuliah : Enterprise Development Software

Tugas ke- : 1 (satu)

Adapun tujuan dari tugas ini dibuat adalah agar mahasiswa lebih memahami cara kerja dari Zoho CRM dan mahasiswa diharapkan dapat mengoperasikan Zoho CRM ini dengan baik.

Hal pertama yang dilakukan adalah menginstal Zoho CRM 5. Proses penginstalan sangat mudah dan cepat. Setelah selesai menginstal Zoho CRM 5, klik pada shortcut yang terdapat desktop. Kemudian akan muncul cmd dengan tampilan seperti dibawah ini.



```
=====
Starting Server from location: C:\AdventNet\ZohoCRM
Free edition...

Modules already Populated

Persistence           [ LOADED ]
Logging               [ LOADED ]
SQMS                  [ LOADED ]
Audit                 [ LOADED ]
Authentication         [ LOADED ]
Authorization          [ LOADED ]
CustomView            [ LOADED ]
WorkEngine            [ LOADED ]
Tomcat                 [ LOADED ]
FileStore              [ LOADED ]
AdventNetCRMSFA        [ LOADED ]
AllowTempTables        [ LOADED ]

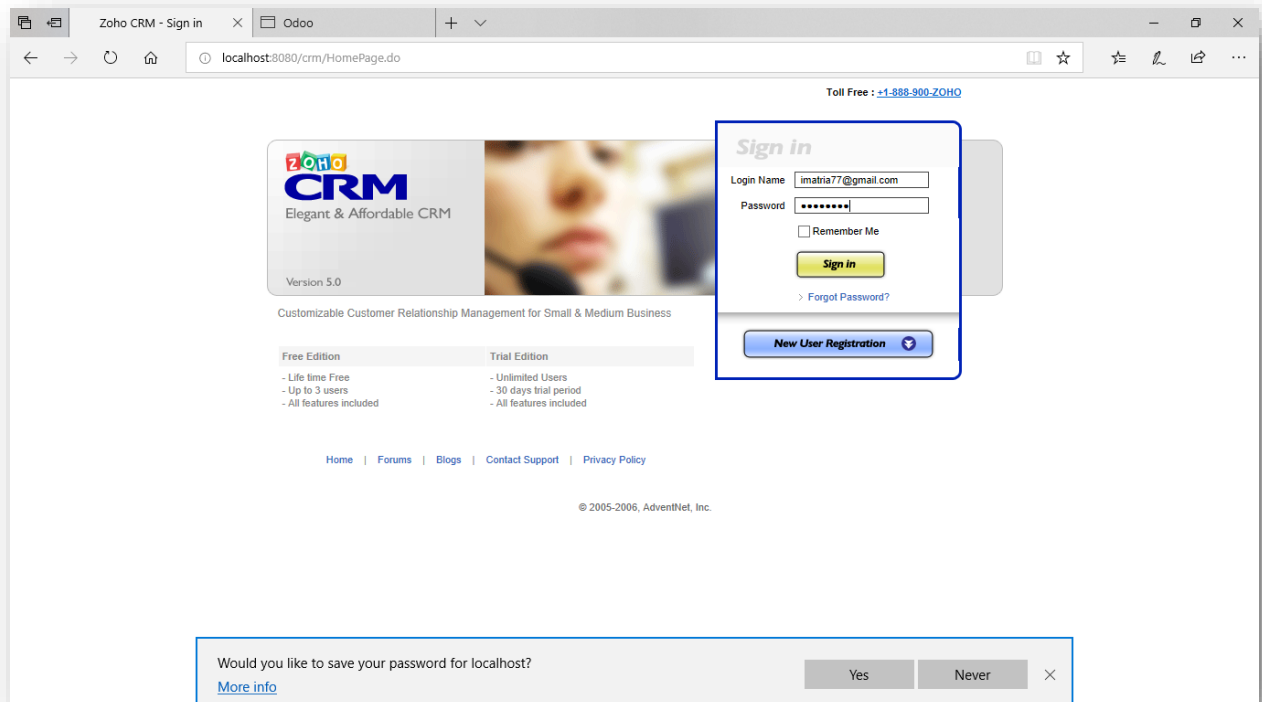
Creating Services
CacheService           [ CREATED ]
MDSservice              [ CREATED ]
LoggingService          [ CREATED ]
AuthorizationService    [ CREATED ]
ThreadPoolService       [ CREATED ]
WorkEngineService       [ CREATED ]
WebService              [ CREATED ]

Starting Services
CacheService           [ STARTED ]
MDSservice              [ STARTED ]
LoggingService          [ STARTED ]
AuthorizationService    [ STARTED ]
ThreadPoolService       [ STARTED ]
WorkEngineService       [ STARTED ]
WebService              [ STARTED ]

Server started in :: [20380 ms]

Connect to: [ http://localhost:8080/crm/HomePage.do ]
```

Kemudian pada browser akan muncul tampilan seperti dibawah ini. Ini berarti bahwa Zoho CRM telah berhasil terpasang. Hal selanjutnya yang harus kita lakukan adalah sign in di Zoho CRM. Jika belum memiliki akun maka harus mendaftar terlebih dahulu dengan klik 'New User Registration'.



Jika Anda sudah berhasil sign in di Zoho CRM, akan tampil Home Page dari Zoho CRM seperti dibawah ini. Dengan begitu, kita dapat membuat sebuah case atau proyek di Zoho CRM tersebut.

### Contoh bisnis yang diterapkan

Bisnis yang kami terapkan pada Zoho CRM 5 ini berupa manajemen calon pembeli (customers) pada sebuah toko elektronik yang khusus menjual laptop, yaitu 'NadiaTria Company'.

Adapun masalah bisnis yang dapat diselesaikan dengan Zoho CRM 5 ini adalah.

- Mengisi lead information secara lengkap
- Mencatat kontak dan akun pelanggan (customer)
- Mendeskripsikan produk yang akan dijual
- Membuat jadwal pengingat untuk pelanggan mengenai jadwal pembayaran dengan fitur Activities → New Event
- Membuat report dari semua aktivitas yang dilakukan, contohnya report mengenai produk laptop yang ada

Berikut ini adalah langkah-langkahnya.

# 1. Pertama Membuat produk yang akan dijual.

Caranya dengan meng-klik *Products* pada menu navbar → klik *New Product* di bawah menu navbar. Setelah itu akan muncul form produk, isi form sesuai data produk yang akan dijual dan klik save untuk menyimpannya.

The screenshot shows the Zoho CRM interface with the 'Edit Product' form. The 'Products' menu in the top navigation bar is circled in red. A dropdown arrow points to 'New Product' in the 'Products' menu. The form contains the following sections:

- Product Information:** Product Owner: imatria77, Product Code: lap-001, Product Active: ☒, Product Category: Hardware, Sales End Date: 09/12/2019, Support Expiry Date: 09/12/2019.
- Price Information:** Unit Price: 1,000, Commission Rate: 15, Tax: Sales Tax.
- Stock Information:** Usage Unit: Box, Qty/Unit: 10, Qty in Stock: 10, Reorder Level: 7, Qty in Demand: 10, Handler: imatria77.
- Description Information:** Description: -Intel Core i5-8250U 1.6GHz with Turbo Boost up to 3.4GHz, -NVIDIA GeForce MX130 with 2GB VRAM, -4GB DDR4 Memory, -1000GB HDD.

The screenshot shows the Zoho CRM interface with the 'Create Product' form. The 'Products' menu in the top navigation bar is circled in red. A dropdown arrow points to 'New Product' in the 'Products' menu. The form contains the following sections:

- Product Information:** Product Owner: imatria77, Product Code: lap-002, Product Active: ☒, Product Category: Hardware, Sales End Date: 09/15/2019, Support Expiry Date: 09/15/2019.
- Price Information:** Unit Price: 1000, Commission Rate: 20, Tax: Sales Tax.
- Stock Information:** Usage Unit: Box, Qty/Unit: 7, Qty in Stock: 7, Reorder Level: 5, Qty in Demand: 7, Handler: imatria77.
- Description Information:** Description: -CPU Intel Core i5-8250U, -SuperBattery, Safeguards the battery, -Lightweight, Extremely portable, -NanoEdge Display, Immersive Visuals.

2. Kedua menambahkan *Vendor* yang artinya perusahaan yang akan menjual produk ke pihak pembeli atau *customer*.

Caranya dengan meng-klik *Vendors* pada menu navbar → klik *New Vendor* di bawah menu navbar. Setelah itu akan muncul form vendor, isi form tersebut sesuai data vendor (perusahaan) dan klik save untuk menyimpannya.

The screenshot shows the Zoho CRM interface for creating a new vendor. The 'Vendors' menu item is circled in red. The 'New Vendor' option in the dropdown menu is also circled in red. The form contains fields for Vendor Information, Address Information, and Description Information. The 'Save' button at the bottom is circled in red.

Vendor Information	
Vendor Owner :	imatria77
Phone :	081234568976
Website :	alicooperation.com
Category :	Electronic Store

Address Information	
Street :	Adam Malik
State :	Indonesia
Country :	Indonesia
City :	Medan
Zip Code :	20233

Description Information

Description : Vendor ini merupakan vendor yang menyediakan laptop

Save Save & New Cancel

3. Ketiga menambahkan *Leads* yang artinya seseorang tertarik ingin membeli produk yang dijual (pembeli).

Caranya dengan meng-klik *Leads* pada menu navbar → klik *New Lead* di bawah menu navbar. Setelah itu akan muncul form, isi form sesuai data lead (pembeli) dan klik save untuk menyimpan data lead (pembeli).

The screenshot shows the Zoho CRM interface for editing a lead. The 'Leads' menu item is circled in red. The 'New Lead' option in the dropdown menu is also circled in red. The form contains fields for Lead Information, Address Information, and Description Information. The 'Save' button at the bottom is circled in red.

Lead Information	
Lead Owner :	imatria77
First Name :	Mrs. Tria
Designation :	
Phone :	
Mobile :	081397198741
Lead Source :	OnlineStore
Industry :	ASP
Annual Revenue :	100
Campaign Source :	

Address Information	
Street :	Japaris
State :	Indonesia
Country :	Indonesia
City :	Medan
Zip Code :	20215

Description Information

Description : Menjual laptop berbagai merk dengan harga terjangkau dan kualitas terjamin

Save Save & New Cancel

4. Setelah menambahkan Leads, kemudian menambahkan *Accounts*.

Caranya dengan meng-klik *Accounts* pada menu navbar → klik *New Account* di bawah menu navbar. Setelah itu akan muncul form account, isi form tersebut sesuai calon pembeli dan klik save untuk menyimpannya.

The screenshot shows the Zoho CRM interface with the 'Accounts' menu highlighted. The 'Create Account' form is displayed with the following fields:

- Account Information:** Account Owner (imatria77), Account Name (tria12), Account Site (https://www.facebook.com/trianiskiani/), Parent Account, Account Number (10), Account Type (Customer), Industry (ASP), Annual Revenue (10000), Rating (Active), Phone (081397187987), Fax, Website (nediatricaco.com), Ticker Symbol, Ownership (Private), Employees, SIC Code.
- Address Information:** Billing Street (Karakatau), Billing City (Medan), Billing State (Sumatera Utara), Billing Code (20116), Billing Country (Indonesia), Shipping Street (Karakatau), Shipping City (Medan), Shipping State (Sumatera Utara), Shipping Code (20116), Shipping Country (Indonesia).
- Description Information:** Description (ini akun tria customer).

5. Kemudian tambahkan *Contacts*.

Caranya dengan meng-klik *Contacts* pada menu navbar → klik *New Contact* di bawah menu navbar. Setelah itu akan muncul form contact, isi form tersebut sesuai calon pembeli dan klik save untuk menyimpannya.

The screenshot shows the Zoho CRM interface with the 'Contacts' menu highlighted. The 'Create Contact' form is displayed with the following fields:

- Contact Information:** Contact Owner (imatria77), First Name (Ms. Tria), Account Name, Email (imatria77@gmail.com), Department (Laptop Service), Home Phone (0617323064), Fax, Date of Birth (09/01/1997), Asst Phone, Lead Source (OnlineStore), Last Name (Riskiani), Vendor Name (Ali Cooperation), Title, Phone (081397198741), Other Phone, Mobile (081397198741), Assistant, Reports To.
- Address Information:** Mailing Street (Karakatau), Mailing City (Medan), Mailing State (Sumatera Utara), Mailing Zip (20116), Mailing Country (Indonesia), Other Street, Other City, Other State, Other Zip, Other Country.
- Description Information:** Description (testtesttesttesttest).

6. Selanjutnya membuat *Quote* ini akan diberikan ke pembeli setelah adanya permintaan penawaran.

Caranya dengan meng-klik *New Contact* di bawah menu navbar. Setelah itu akan muncul form contact, isi form tersebut sesuai calon pembeli dan klik save untuk menyimpannya.

**Create Quote**

**Quote Information**

Quote Owner: **imatria77**

\* Subject: Order Laptop

Quote Stage: Draft

Team: Ex-Team

Carrier: FedEX

**Address Information**

Billing Street: Karakatau  
Billing City: Medan  
Billing State: Sumatera Utara  
Billing Code: 20116  
Billing Country: Indonesia

Shipping Street: Karakatau  
Shipping City: Medan  
Shipping State: Sumatera Utara  
Shipping Code: 20116  
Shipping Country: Indonesia

**Product Details**

*Product Name	Product Code	Qty.in Stock	*Qty	Unit Price	*List Price	Total
Acer Aspire E-14	lap-001	10	1	1,000	10000	10000

**Sub Total:** 10000  
**Tax:** 0  
**Adjustment:** 0  
**Grand Total:** 10000

**Terms and Conditions**

Terms and Conditions: 100% Kualitas terjamin dan Bagus.

**Description Information**

Description: testtesttesttesttestes

**Save** **Save & New** **Cancel**

7. Membuat *Potential* dengan meng-klik *Potential* pada menu navbar → Klik *New Potential* dibawah menu navbar. Dan akan muncul tampilan form potential, isi form tersebut dan kemudian klik save untuk menyimpan.

The screenshot shows the Zoho CRM interface for creating a new potential. The 'Potential' menu is highlighted in the top navigation bar. The 'New Potential' option is highlighted in the dropdown menu. The form contains the following fields:

- Potential Information:**
  - Potential Owner: imatria77
  - \* Potential Name: New PreOrder
  - \* Account Name: tria12
  - Type: New Business
  - Next Step: Purchase
  - Campaign Source:
  - Amount: 10000
  - \* Closing Date: 09/30/2019
  - \* Stage: Qualification
  - Probability: 20
  - Lead Source: OnlineStore
- Description Information:**
  - Description: Potential information product

The 'Save' button is highlighted with a red circle.

8. Membuat *Sales Order* yang diterima dari pembeli atau *customer*.

Caranya dengan meng-klik *Sales Orders* pada menu navbar → Klik *New Sales Order* dibawah menu navbar. Setelah itu akan muncul form sales orders, isi form tersebut sesuai pesanan yang sudah diterima dan klik save untuk menyimpannya.

The screenshot shows the Zoho CRM interface for editing a sales order. The 'Sales Orders' menu is highlighted in the top navigation bar. The 'New Sales Order' option is highlighted in the dropdown menu. The form contains the following fields:

- Sales Order Information:**
  - Sales Order Owner: imatria77
  - \* Subject: Order Laptop
  - Customer No: 01001
  - Sales Order Name: Order Laptop
  - Pending:
  - Carrier: FedEx
  - Sales Commission: 20
  - \* Account Name: tria12
- Address Information:**
  - Billing Street: Karakatau
  - Billing City: Medan
  - Billing State: Sumatera Utara
  - Billing Code: 20116
  - Billing Country: Indonesia
  - Shipping Street: Karakatau
  - Shipping City: Medan
  - Shipping State: Sumatera Utara
  - Shipping Code: 20116
  - Shipping Country: Indonesia
- Product Details:**

*Product Name	Product Code	Qty. in Stock	*Qty	Unit Price	*List Price	Total
Acer Aspire E-14	lap-001	10	1	1,000	10,000	10,000

Sub Total: 10,000  
Tax: 0.0  
Adjustment: 0.0  
Grand Total: 10,000
- Terms and Conditions:**

Terms and Conditions: 100% Kualitas terjamin dan Bagus
- Description Information:**
  - Description: testtesttesttesttest

The 'Save' button is highlighted with a red circle.

9. Membuat *Purchase Orders* yang sudah dibuat oleh pembeli untuk memberitahukan produk yang ingin dibeli oleh pembeli atau *customer*.

Caranya dengan meng-klik *Purchase Orders* pada menu navbar → klik *New Purchase Order* dibawah menu navbar. Setelah itu akan muncul form, isi form dan klik save untuk menyimpannya.

**Purchase Order Information**

Purchase Order Owner: imatria77

\* Subject: Order Laptop Asus Aspire E-14

Requisition No: 01001

Contact Name: Tria Riskiani

Due Date: 09/15/2019

Excise Duty: 500

Status: Approved

**Address Information**

Billing Street: Japaris

Billing City: Medan

Billing State: Sumatera Utara

Billing Code: 20215

Billing Country: Indonesia

Shipping Street: Japaris

Shipping City: Medan

Shipping State: Sumatera Utara

Shipping Code: 20215

Shipping Country: Indonesia

**Product Details**

*Product Name	Product Code	Qty.in Stock	*Qty	Unit Price	*List Price	Total
Asus VivoBook S	lap-002	7	3	1,000	10000	30000

Sub Total: 30000

Tax: 0

Adjustment: 0

Grand Total: 30000

**Terms and Conditions**

Terms and Conditions: 100% Kualitas terjamin dan Bagus.

**Description Information**

Description: testtesttesttesttesttest

**Save** **Save & New** **Cancel**



10. Membuat *Invoice* sebagai bukti pembelian dan jumlah pembayaran yang harus dibayar oleh pembeli.

Caranya dengan meng-klik *Invoices* pada menu navbar → klik *New Invoice* dibawah menu navbar. Setelah itu akan muncul form invoice, isi form sesuai yang dibeli dan harga yang akan dibayar dan klik save untuk menyimpannya.

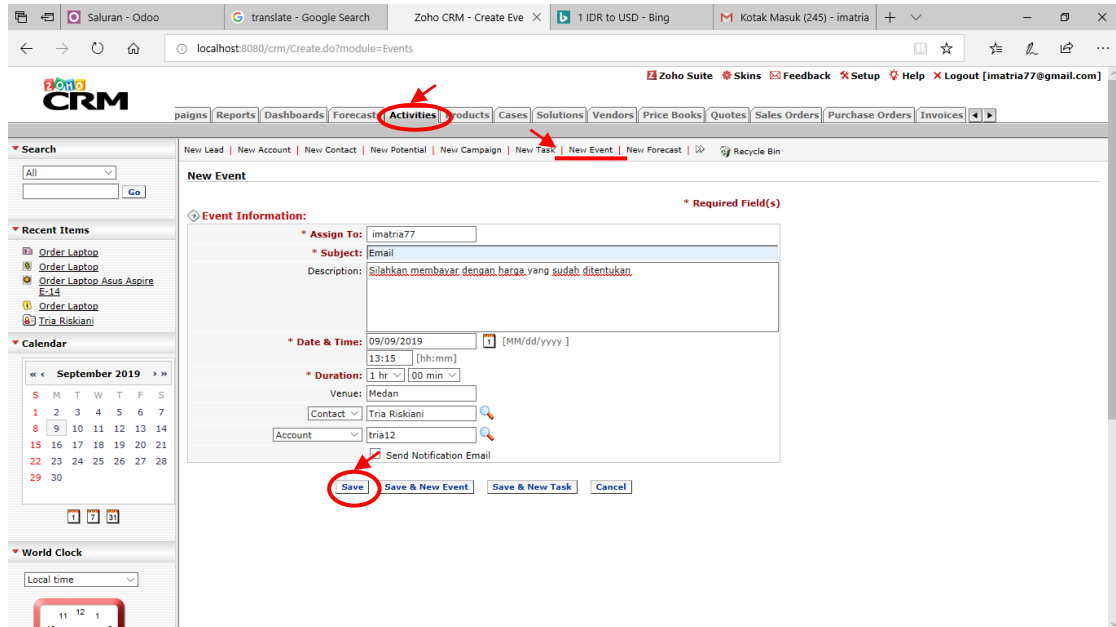
The screenshot shows the Zoho CRM interface for creating a new invoice. The top navigation bar includes 'Invoices', which is highlighted with a red circle. A dropdown menu is open from 'Invoices', and 'New Invoice' is selected, also highlighted with a red circle. The main form is titled 'Create Invoice' and contains several sections:

- Invoice Information:** Includes fields for Invoice Owner (imatria77), Subject (Order Laptop), Invoice Date (09/10/2019), Due Date (09/30/2019), Sales Commission (20.0), and Account Name (trial2).
- Address Information:** Includes fields for Billing and Shipping Street, City, State, Code, and Country.
- Product Details:** A table with columns for Product Name, Product Code, Qty. in Stock, Qty, Unit Price, List Price, and Total. The table contains one row for 'Acer Aspire E-14'.
- Terms and Conditions:** A text area containing '100% Kualitas terjamin dan Bagus'.
- Description Information:** A text area containing 'testtesttesttesttesttest'.

At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'. The 'Save' button is circled in red. The form also includes a sidebar with 'Search', 'Recent Items', 'Calendar', 'World Clock', and 'Calculator'.

11. Kemudian membuat *Event* sebagai peringatan untuk membayar produk yang telah di tawarkan atau dipesan oleh pembeli.

Caranya dengan meng-klik *Activities* pada menu navbar → klik *New Event* di bawah menu navbar. Setelah itu akan muncul form event, isi form tersebut sesuai peringatan apa yang akan mau dikirimkan dan klik save untuk menyimpannya.

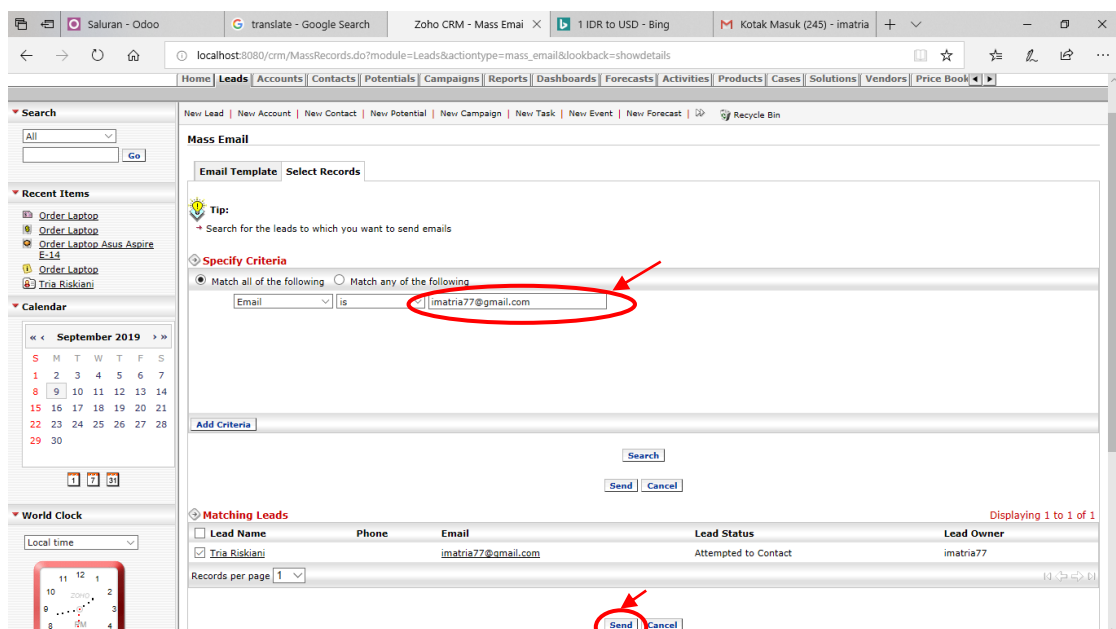


The screenshot shows the Zoho CRM interface with the 'Activities' menu highlighted. The 'New Event' form is displayed with the following fields:

- Assign To:** imatria77
- Subject:** Email
- Description:** Silahkan membayar dengan harga yang sudah ditentukan.
- Date & Time:** 09/09/2019 13:15 [MM/dd/yyyy]
- Duration:** 1 hr 00 min
- Venue:** Medan
- Contact:** Tria Riskiani
- Account:** tria12
- Send Notification Email:** ☒

Buttons at the bottom: Save, Save & New Event, Save & New Task, Cancel.

Selanjutnya masukkan email pembeli dan klik send untuk mengirim peringatan yang sudah dibuat.



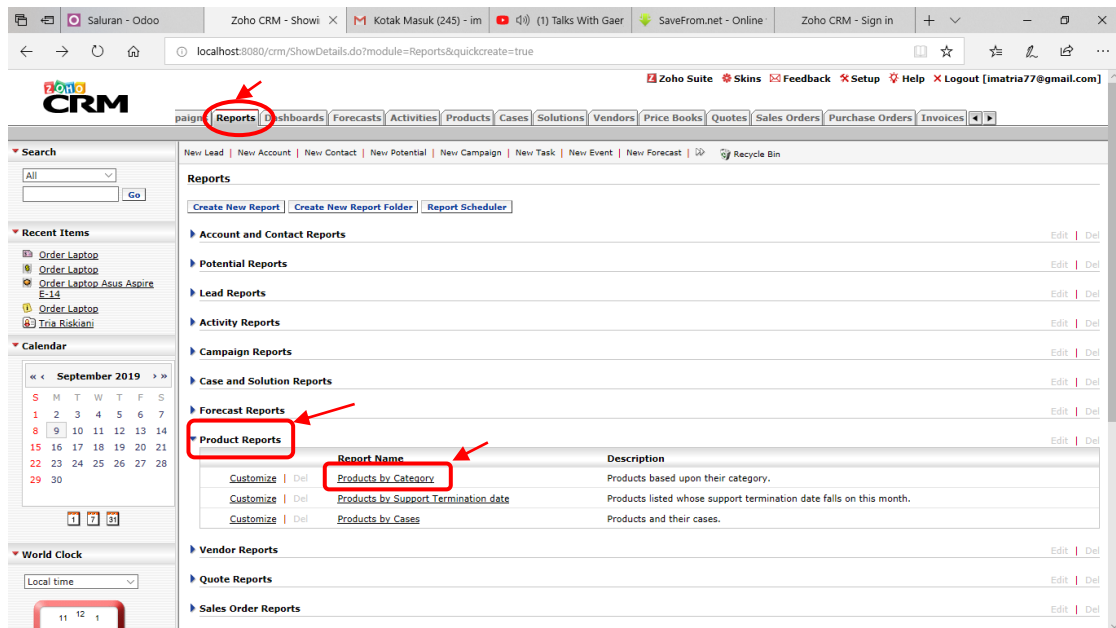
The screenshot shows the Zoho CRM 'Mass Email' form. The 'Specify Criteria' section is active, showing a search for leads with the email 'imatria77@gmail.com'. The 'Matching Leads' table is displayed below.

Lead Name	Phone	Email	Lead Status	Lead Owner
<input checked="" type="checkbox"/> Tria Riskiani		imatria77@gmail.com	Attempted to Contact	imatria77

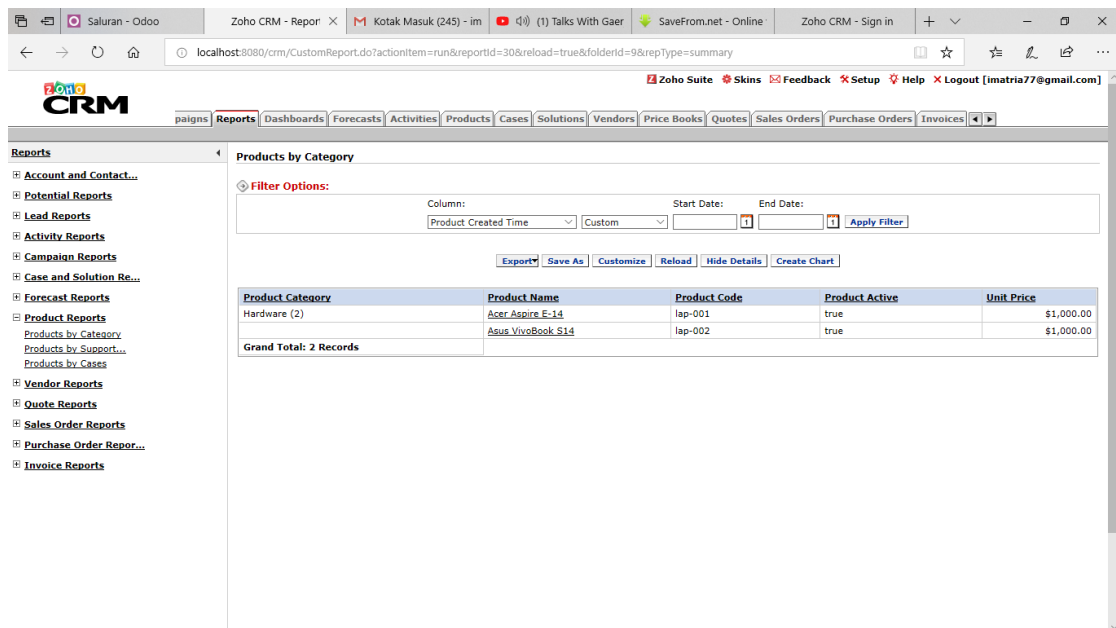
Buttons at the bottom: Send, Cancel.

12. Yang terakhir membuat *Reports* atau laporan.

Caranya dengan meng-klik *Repots* pada menu navbar → Pilih reports, disini memilih report “*Product Reports*” → Kemudian pilih “*Products by Category*”.



Akan muncul seperti pada gambar dibawah ini.



Selanjutnya klik tombol *Export* → Pilih ekspor, disini memilih “*Export to PDF*”. Ini akan mendownload report tersebut.

The screenshot shows the Zoho CRM Reports interface. The left sidebar lists various report categories, including 'Product Reports'. The main area displays the 'Products by Category' report. Above the table, there are filter options for 'Column' (set to 'Product Created Time') and 'Start Date' (set to '1'). Below the filters, the 'Export' button is circled in red. Other buttons like 'Save As', 'Customize', 'Reload', 'Hide Details', and 'Create Chart' are also visible. The table below shows two records: 'Hardware (2)' with 'Acer Aspire E-14' and 'Asus VivoBook S14', both with 'Product Code' 'lap-001' and 'lap-002' respectively, and 'Unit Price' of '\$1,000.00'. The 'Grand Total' is '2 Records'.

Product Category	Product Name	Product Code	Product Active	Unit Price
Hardware (2)	Acer Aspire E-14	lap-001	true	\$1,000.00
	Asus VivoBook S14	lap-002	true	\$1,000.00
Grand Total: 2 Records				

Ini adalah hasil ekspor dari report yang akan di simpan atau di cetak.

The screenshot shows the PDF report generated by Zoho CRM. The report is titled 'Products by Category' and was generated by 'imatria77' on '9/9/19 7:38 AM'. The table below shows two records: 'Hardware (2)' with 'Acer Aspire E-14' and 'Asus VivoBook S14', both with 'Product Code' 'lap-001' and 'lap-002' respectively, and 'Unit Price' of '\$1,000.00'. The 'Grand Total' is '2 Records'. The footer of the report states 'Copyright (c) 2006 AdventNet, Inc. All rights reserved'.

Product Category	Product Name	Product Code	Product Active	Unit Price
Hardware (2)	Acer Aspire E-14	lap-001	true	\$1,000.00
	Asus VivoBook S14	lap-002	true	\$1,000.00
Grand Total: 2 Records				