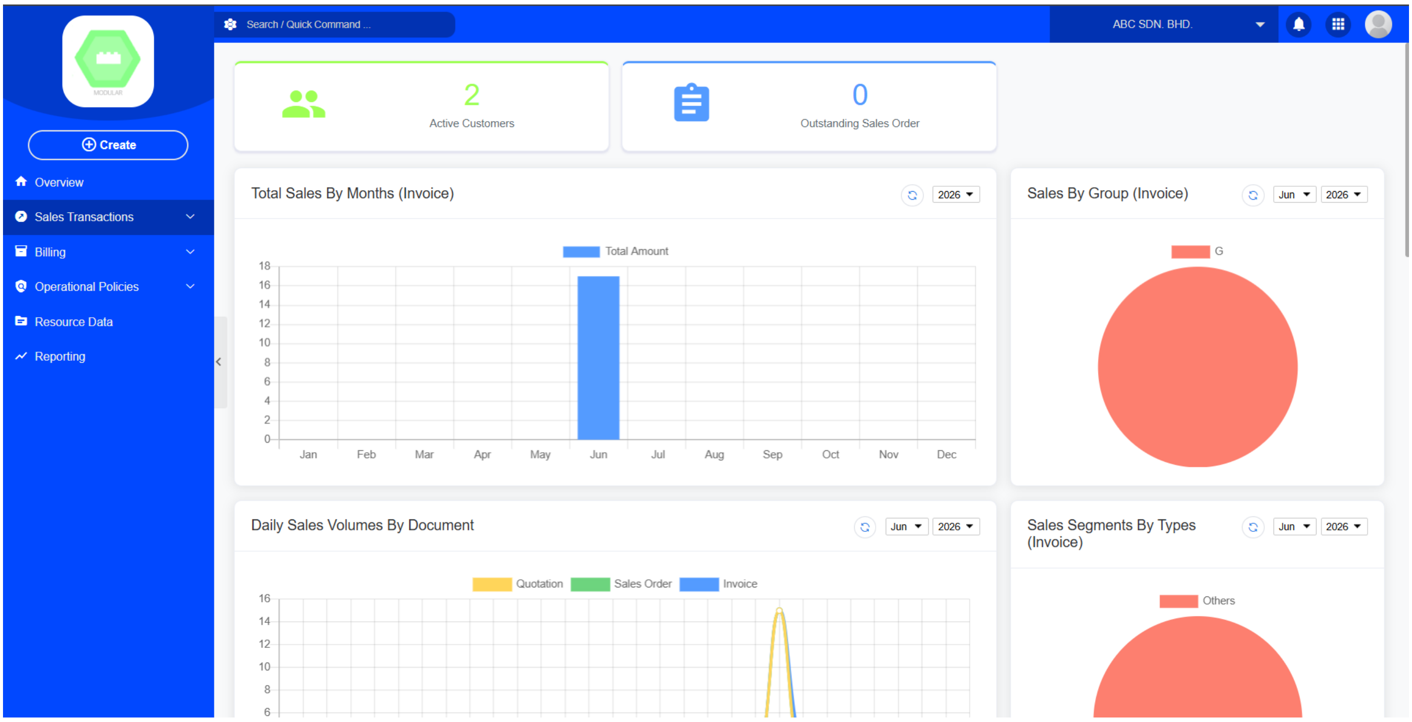
Sales

Sales Overview

Overview

The **Sales Dashboard** provides a real-time overview of sales performance, outstanding transactions, customer activities, and product trends. It helps users monitor business performance through summary cards, charts, and detailed record lists.



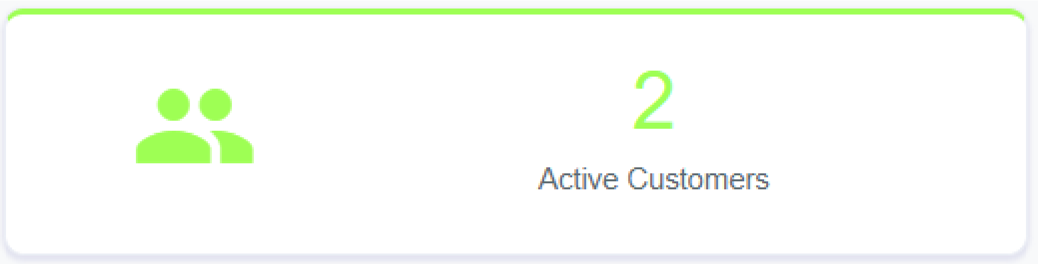
Dashboard Layout

1. Active Customers

Type

- KPI Card

Description
Displays the total number of active customers currently available in the system.



Purpose
Allows users to quickly understand the size of the active customer base.

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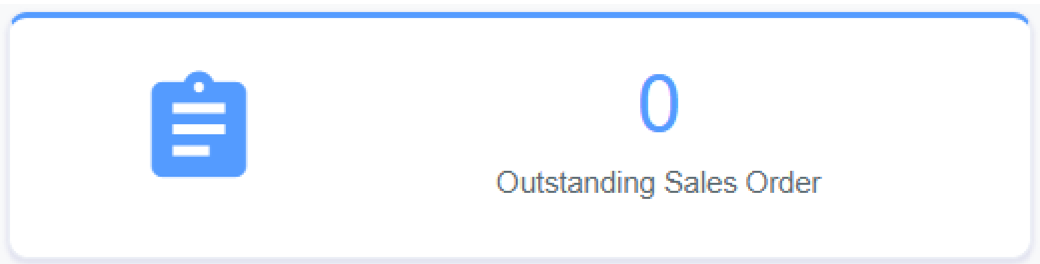
2. Outstanding Sales Order

Type

- KPI Card

Description
Displays the total number of Sales Orders that have not yet been completed.



Purpose
Monitor pending customer orders.

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3. Total Sales By Months (Invoice)

Chart Type

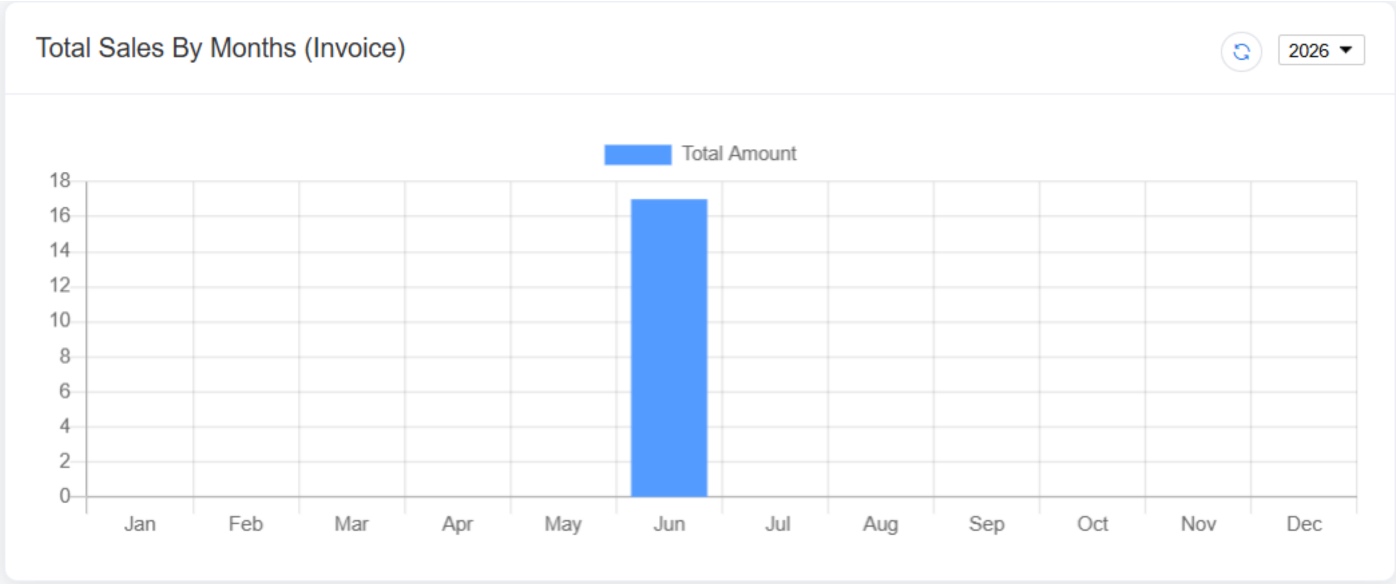
- Bar Chart

Filter

- Year

Display

- Monthly total invoice amount



Purpose

Monitor monthly sales trends.

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4. Sales By Group (Invoice)

Chart Type

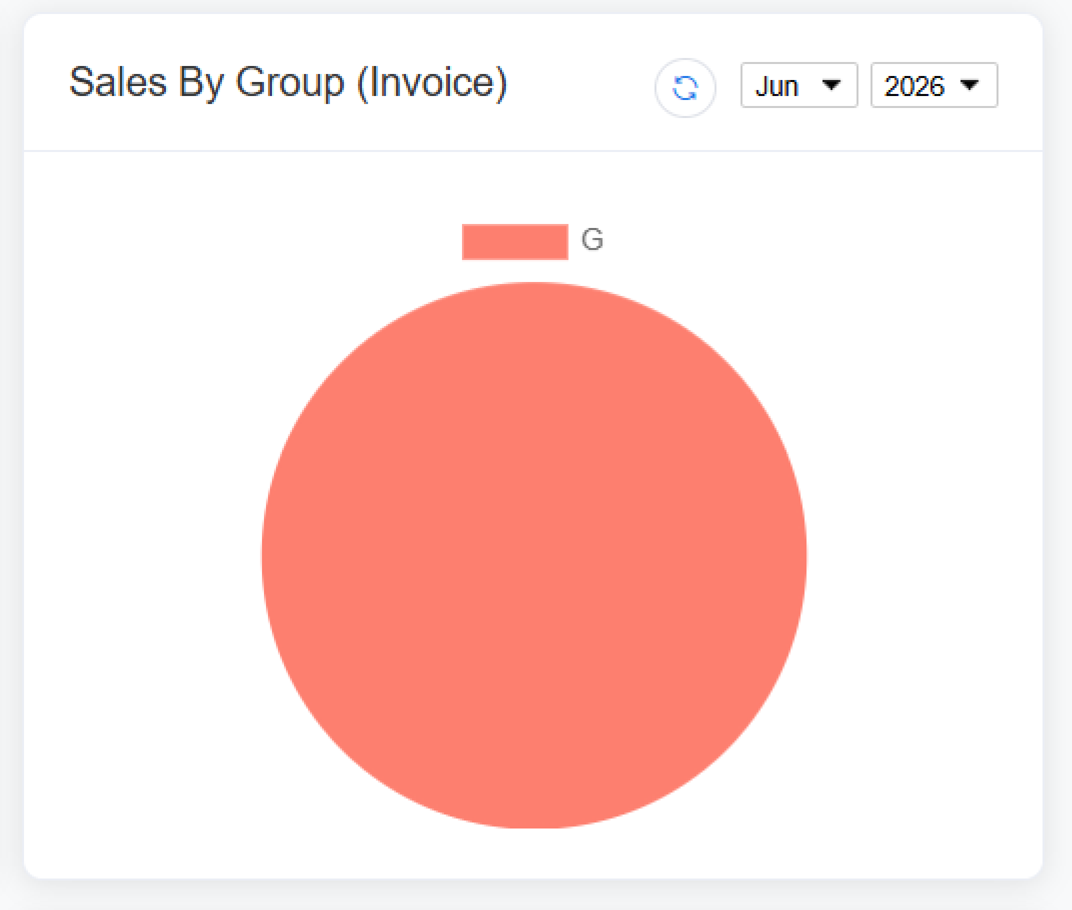
- Pie Chart

Filter

- Month
- Year

Display

Sales distribution based on customer groups or predefined sales groups.



Purpose

Compare sales contribution among different groups.

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5. Daily Sales Volumes By Document

Chart Type

- Smooth Line Chart

Filter

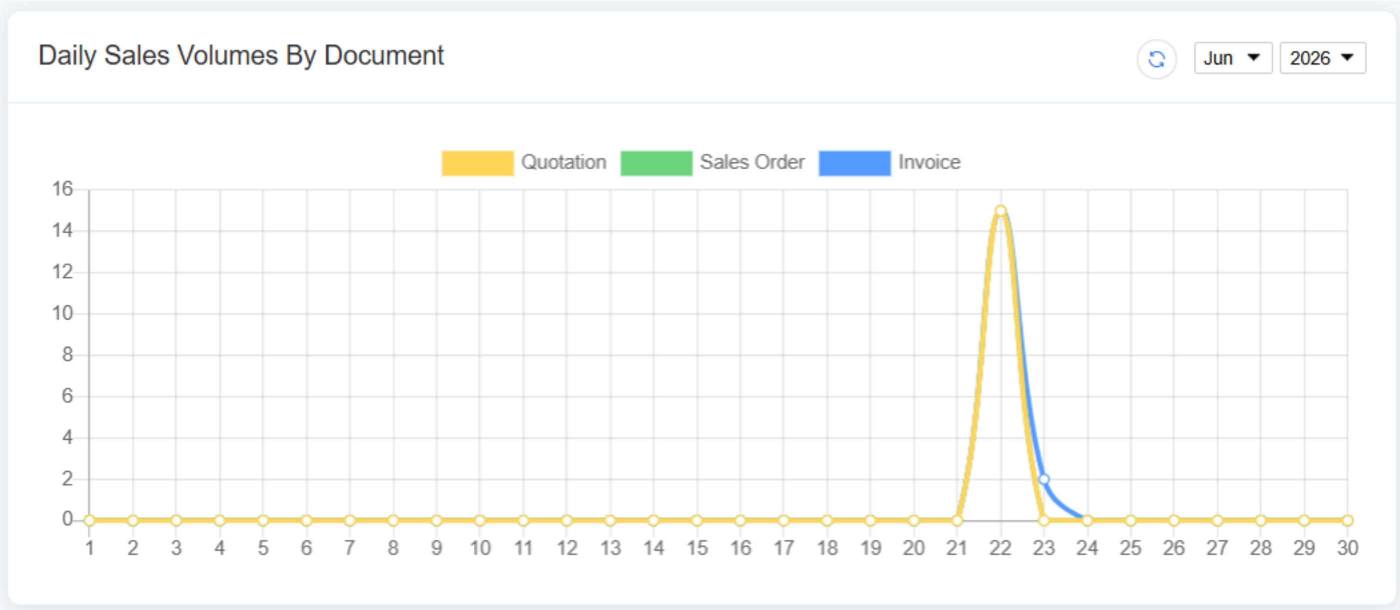
- Month
- Year

Display

Three document types:

- Quotation
- Sales Order
- Invoice

Each line represents daily document volume.



Purpose

Monitor daily sales activities.

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6. Sales Segments By Types (Invoice)

Chart Type

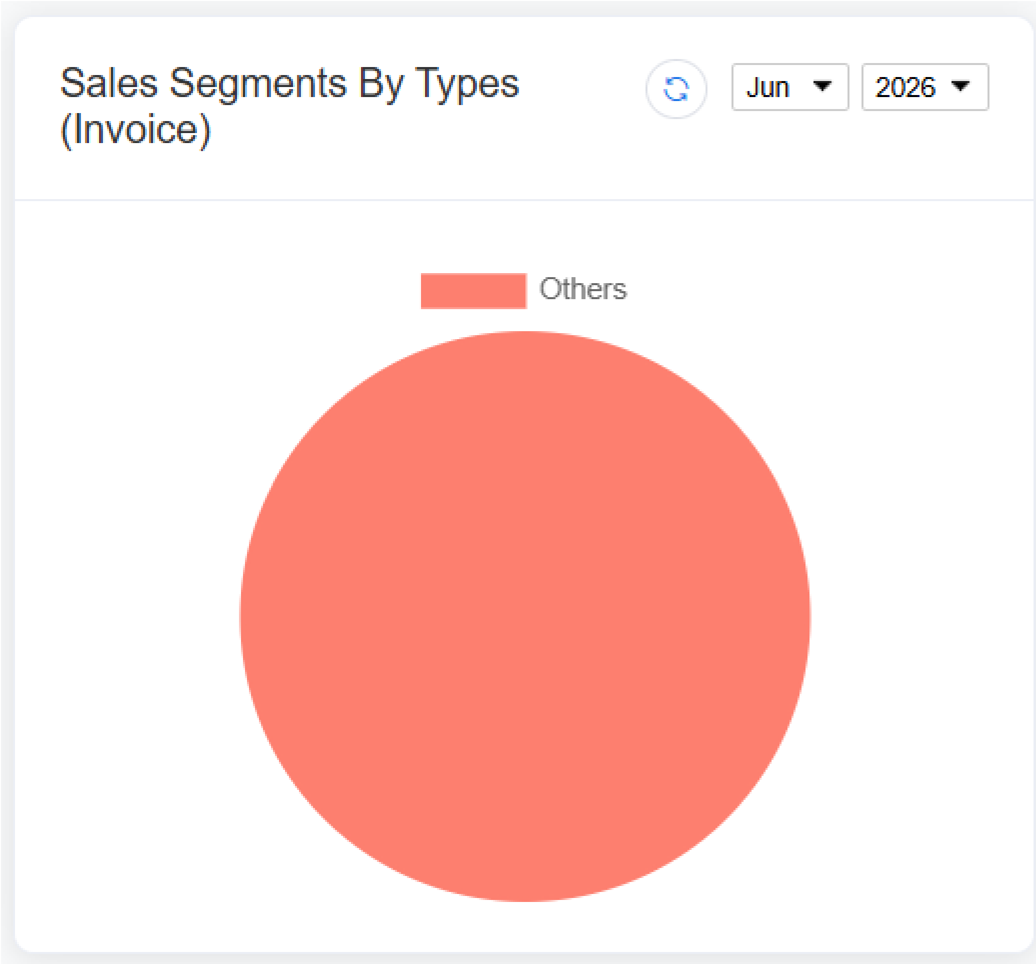
- Pie Chart

Filter

- Month
- Year

Display

Invoice sales distribution by sales type or business segment.



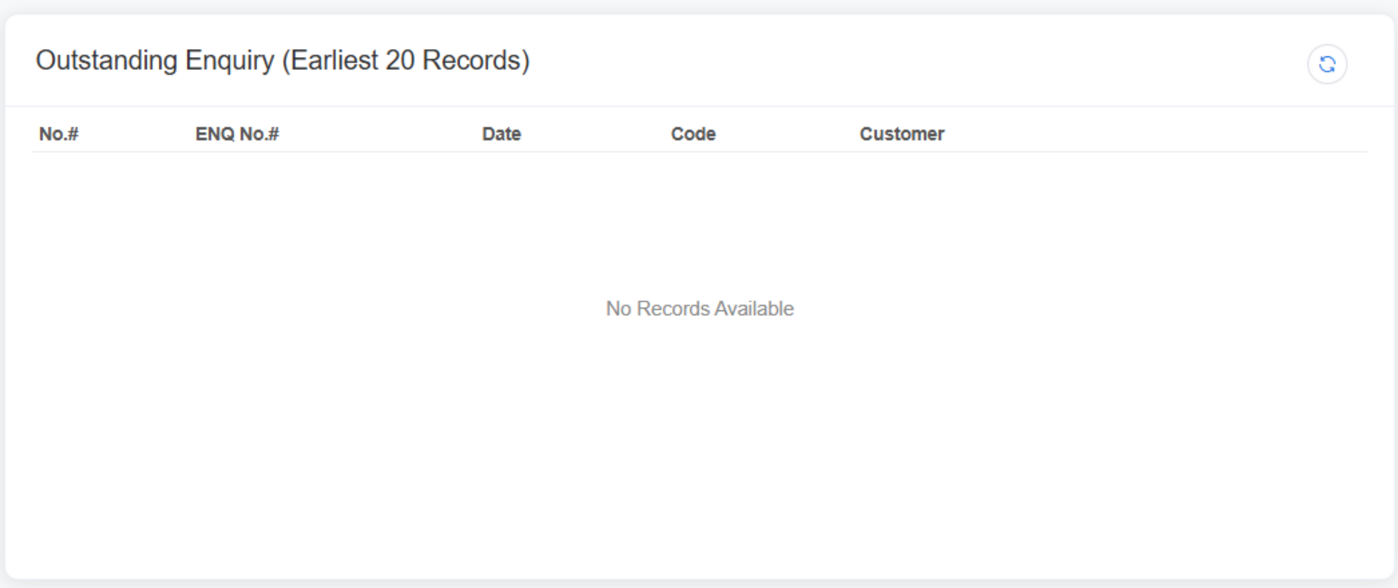
Purpose

Identify which sales segment contributes the most revenue.

Record Lists

7. Outstanding Enquiry (Earliest 20 Records)

Displays the first 20 outstanding enquiries.



8. Enquiry By Types

Chart Type

- Chart

Filter

- Month
- Year

Displays enquiry statistics categorized by enquiry type.

9. Top 20 Contributors

Displays the top 20 customers with the highest sales amount.

Column
No.
Code
Customer
Agent

Column
Amount

Filter

- Month
- Year

Purpose

Identify major revenue contributors.

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10. New Customer Within 7 Days

Displays customers created within the last seven days.

Column
No.
Code
Customer
Agent
Created Date

Purpose

Track newly registered customers.

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11. Top 20 Popular Item / Product

Displays the most frequently sold products.

Column
No.
Code
Product

Column
Quantity Sold
Sales Amount

Purpose

Identify best-selling products.

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12. Outstanding Quotation (Earliest 20 Records)

Displays the earliest 20 quotations that are still pending.

Column
No.
Doc No.
Date
Code
Customer

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13. Outstanding Sales Order (Earliest 20 Records)

Displays the earliest 20 Sales Orders that have not yet been completed.

Column
No.
Doc No.
Date

Column
Code
Customer

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14. Outstanding Draft Quotation (Earliest 20 Records)

Displays quotations saved as Draft.

Column
No.
Doc No.
Date
Company Name

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15. Outstanding Delivery Order (Earliest 20 Records)

Displays delivery orders that are still pending.

Column
No.
Doc No.
Date
Code
Customer

Sales Transactions

Sales Enquiry

Purpose

Record and manage customer enquiries before quotation stage.

Function

- Create new enquiry
- View existing enquiry
- Store enquiry details
- Add internal memo
- Convert to quotation

Sections

Customer Information

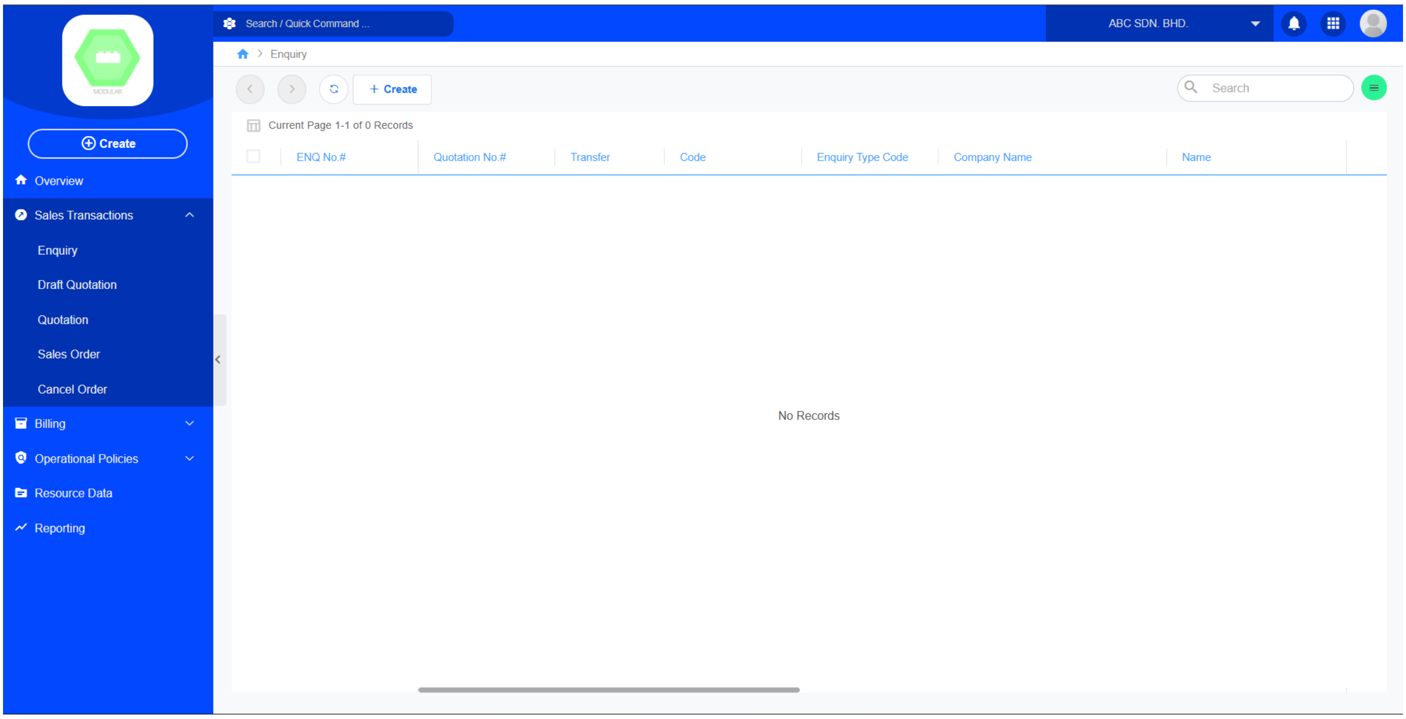
Select or link customer data.

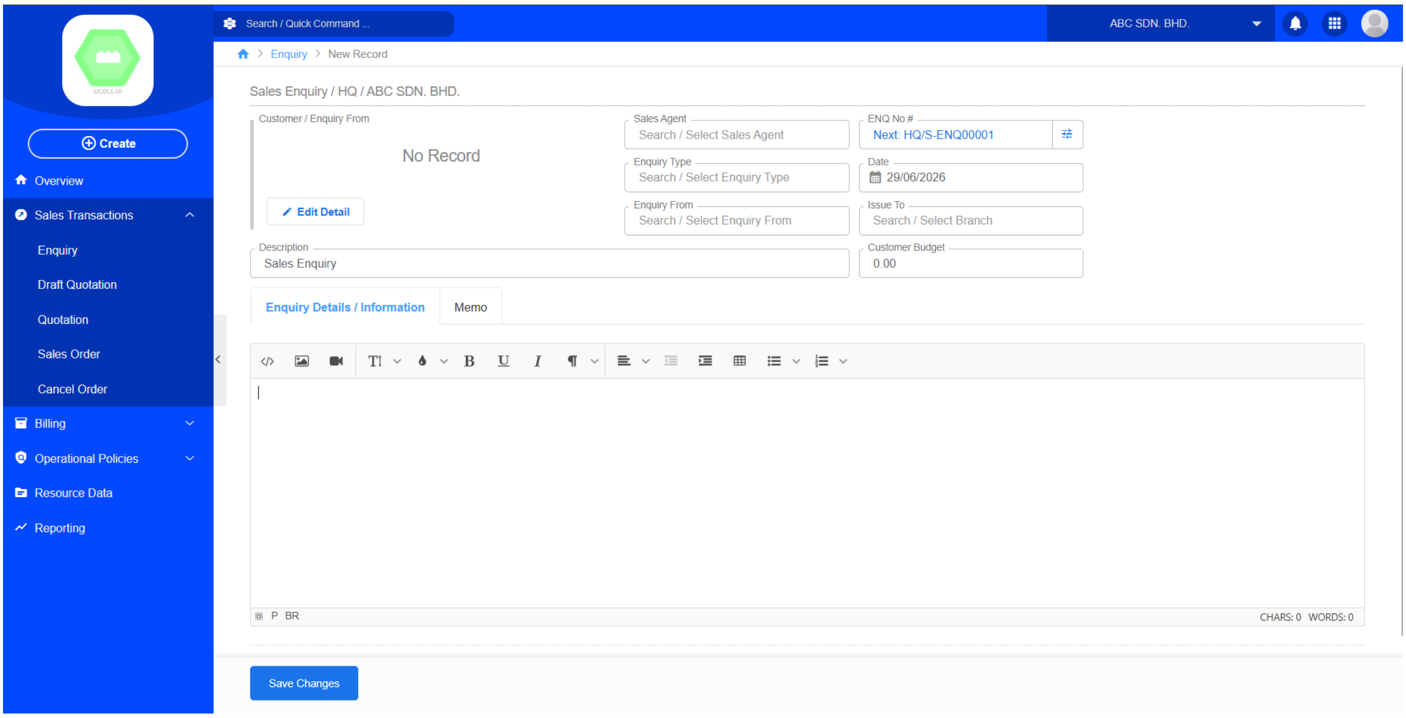
Enquiry Details

Enter customer requirements such as product, quantity, and specifications.

Memo

Internal notes for sales follow-up.





Sales Draft Quotation

Sales Billing

Operational Policies

Sales Transactions

Setup Enquiry

Setup Draft Quotation

Setup Quotation

Setup Sales Order

Setup Cancel Order

Billing

Setup Proforma Invoice

Setup Invoice

Setup Debit Note

Setup Cash sales

Setup Sales Return

Operational Policies

Setup Sales Approval

Setup Stock/Item Exclusion

Setup Tax Exemption