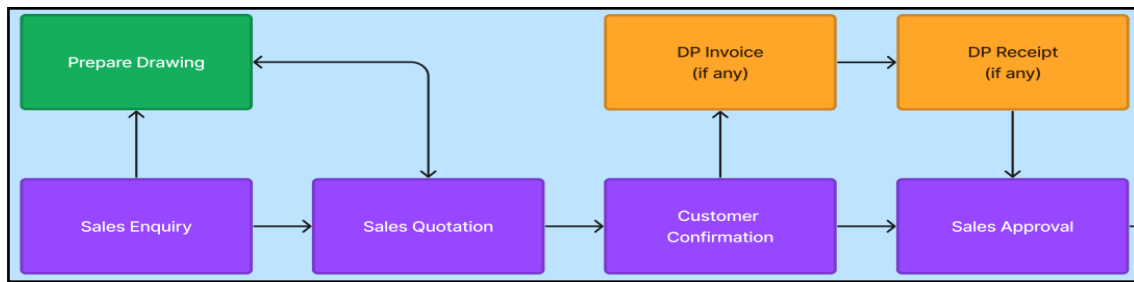
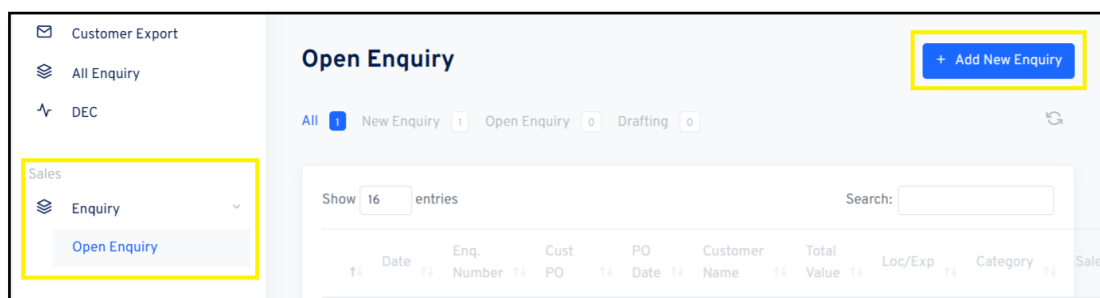


GUIDANCE SALES EXPORT



1. Sales login ke Portal SIP.
2. Untuk menambahkan enquiry baru, sales dapat melakukan **Enquiry >> Open Enquiry >> Add New Enquiry**.



3. Sales mengisi **Data Enquiry** lalu **Submit Form**

- **Enquiry Number** – Nomor enquiry terisi otomatis
- **Customer Name** – Nama customer.
- **Customer PO** – Nomor Purchase Order.
- **PO Date** – Tanggal Purchase Order.
- **Currency** – Jenis mata uang (USD/SGD).
- **Enquiry Value** – Nilai enquiry dalam mata uang yang dipilih. (**Note : Harus diisi** setidaknya estimasi / perkiraan harga, jika harga real sudah ada, dapat di-edit).
- **Enquiry Local / Export** – Enquiry local atau export.
- **Bespoke** – Checklist jika model custom / tidak standar.
- **Sales** – Sales yang handle enquiry tersebut.
- **Product Category** – Pilih produk kategori pada enquiry tersebut.

4. Sales dapat melihat detail enquiry. **Action >> (...) >> Detail**

Open Enquiry + Add New Enquiry

All 1 New Enquiry 1 Open Enquiry 0 Drafting 0

Show entries Search:

Date	Enq. Number	Cust PO	PO Date	Customer Name	Total Value	Loc/Exp	Category	Sales	Status	Action
2023-09-12 New	2300331	12345678	2023-09-12	Leeds Plywoods & Doors Ltd	USD 123.00	Export		Iwan Citra	New Enquiry	...

Showing 1 to 1 of 1 entries

Previous

5. Sales dapat mengedit kembali enquiry pada **Edit Enquiry Info.**

Enquiry Detail ← Back

Sales : morderproc01

Status: New Enquiry Assign

Enq. Number

6. Sales dapat mengubah data enquiry. Jika telah selesai diubah klik **Submit Form.**

Edit Enquiry Form

Update Enquiry data

Add Customer Data

Customer Name

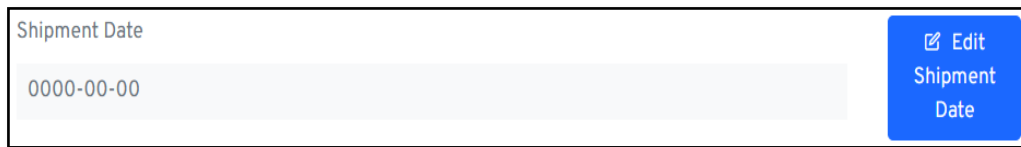
Customer PO

PO Date

Currency

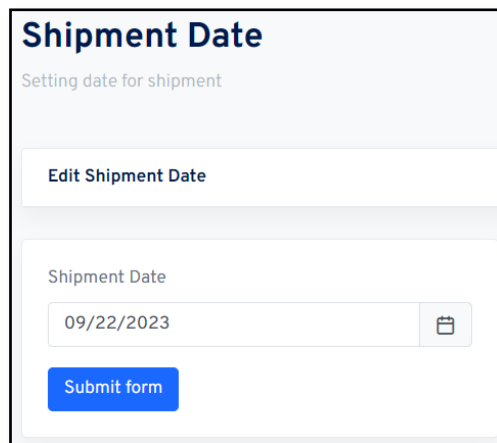
Enquiry Value

7. Sales dapat mengisi tanggal pengiriman pesanan pada bagian **Shipment Date** >> **Edit Shipment Date**.




The screenshot shows a form field labeled "Shipment Date" containing the text "0000-00-00". To the right of the field is a blue button with a pencil icon and the text "Edit Shipment Date".

8. Setelah sales mengisi tanggal pengiriman, sales dapat meng-klik **Submit Form**.



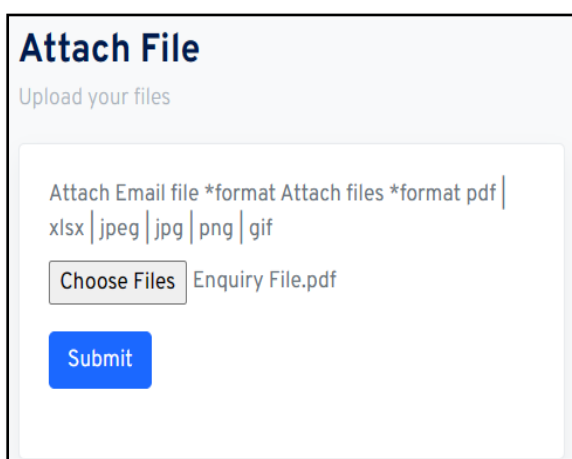
The screenshot shows a form titled "Shipment Date" with the subtitle "Setting date for shipment". Below the title is a section labeled "Edit Shipment Date". Inside this section, there is a "Shipment Date" label above a date input field containing "09/22/2023" and a calendar icon. At the bottom of the section is a blue "Submit form" button.

9. Sales dapat mengisi Enquiry Files(file bukti Customer melakukan pemesanan, dapat berupa email yang di convert ke pdf, jpg dsb). Pada bagian **Enquiry Files** >> **Attach Enquiry Files**. (Attach File MAX 5MB).



The screenshot shows a form field labeled "Enquiry files". To the right of the field is a blue button with an upload icon and the text "Attach Enquiry Files".

10. Setelah sales menginput **Enquiry File**, sales dapat meng-klik **Submit**.



The screenshot shows a form titled "Attach File" with the subtitle "Upload your files". Below the subtitle is a text area containing the text "Attach Email file *format Attach files *format pdf | xlsx | jpeg | jpg | png | gif". Below the text area is a "Choose Files" button and the text "Enquiry File.pdf". At the bottom of the form is a blue "Submit" button.

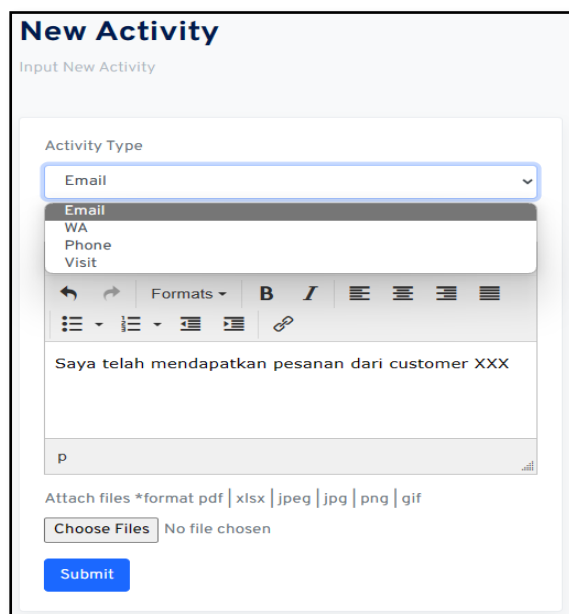
Note : Maksimal ukuran file yang dapat di Attach adalah **5MB**, apabila file melebihi 5MB, harus dipecah terlebih dahulu.

11. Sales dapat menginput aktivitas yang sales lakukan pada enquiry tersebut pada bagian **Sales Activity >> Add New Activity**.



The screenshot shows a section titled "Sales Activity" with a blue button labeled "+ Add New Activity" in the top right corner. Below the header, the word "TIMELINE" is visible.

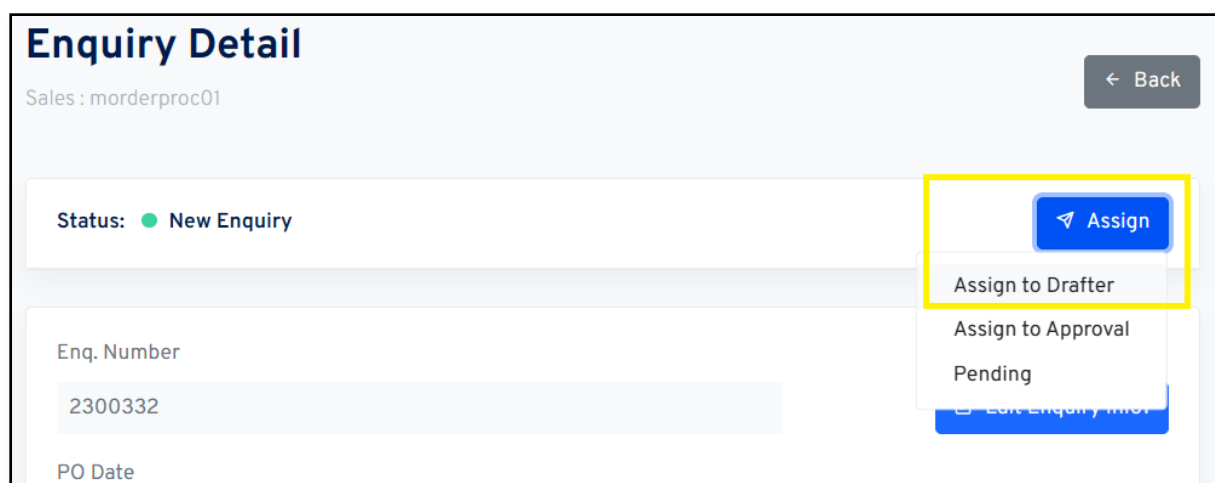
12. Sales dapat menginput aktifitasnya dan memasukan file apabila ingin melampirkan sebuah file juga.



The screenshot shows the "New Activity" form. The "Activity Type" dropdown menu is open, showing options: Email, WA, Phone, and Visit. The text area contains "Saya telah mendapatkan pesanan dari customer XXX". Below the text area, there is a "Choose Files" button and a "Submit" button.

- **Activity Type** – Aktivitas sales dilakukan dengan apa, apakah by Email, WA , Phone atau Visit ke customer.
- **Note** – Dapat menjelaskan aktifitas yang sales lakukan.
- **Attach File** – Dapat meng-input sebuah file pendukung untuk aktifitas tersebut. (Attach File MAX 5MB).

13. Selanjutnya sales dapat mengirim enquiry tersebut ke team Drafter untuk dilakukan pembuatan gambar. Pada bagian **Assign >> Assign to Drafter**.

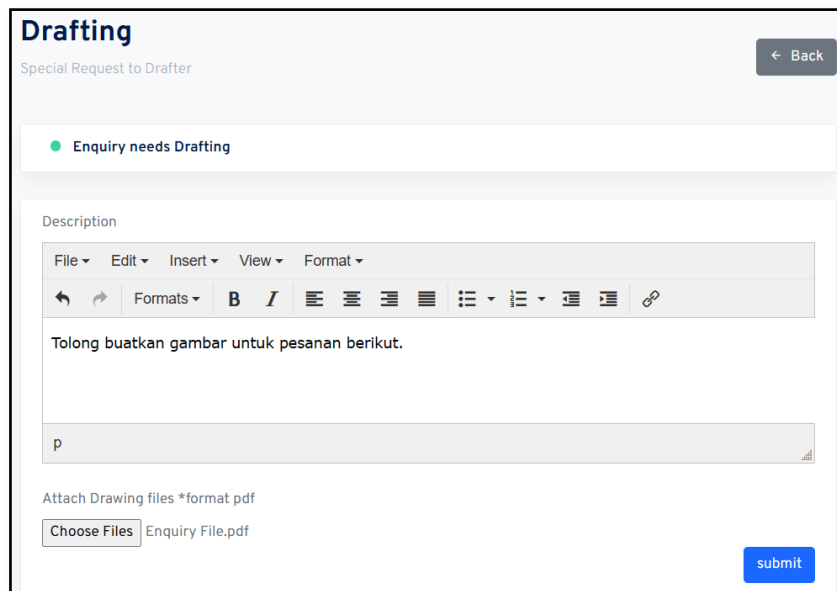


The screenshot shows the "Enquiry Detail" page. The status is "New Enquiry". The "Enq. Number" is 2300332. The "PO Date" is visible. The "Assign" button is highlighted in yellow, and the "Assign to Drafter" option is selected in the dropdown menu.

Note :

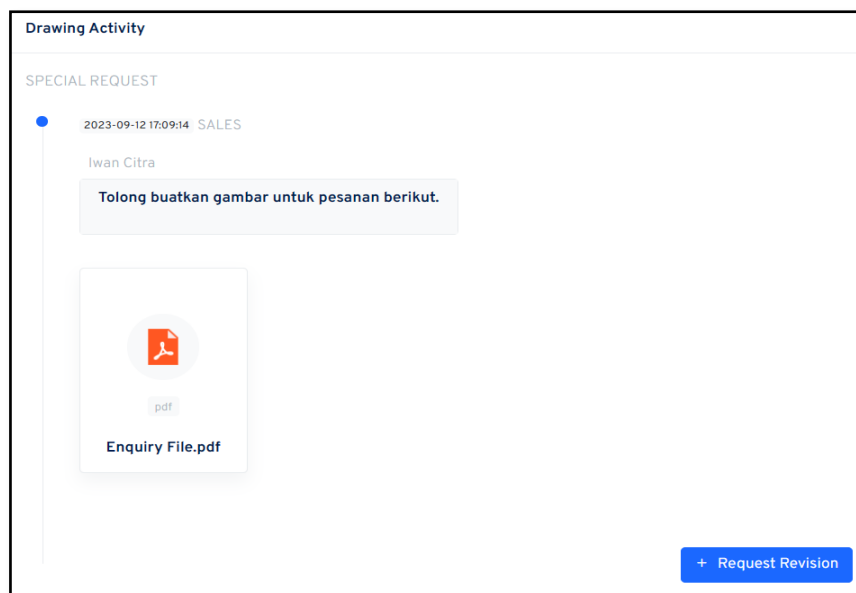
- **Assign to Drafter** – Untuk melanjutkan enquiry ke team Drafter.
- **Assign to Approval** – Untuk mendapatkan Approval pada enquiry tersebut. Dengan catatan, *semua file telah lengkap termasuk kontrak ke customer dsb.*
- **Pending** – Apabila enquiry di pending.

14. Saat melakukan **Assign to Drafter**, sales dapat mengirim pesan dan melampirkan file ke team Drafter. Lalu **Submit**. (Attach File MAX 5MB).



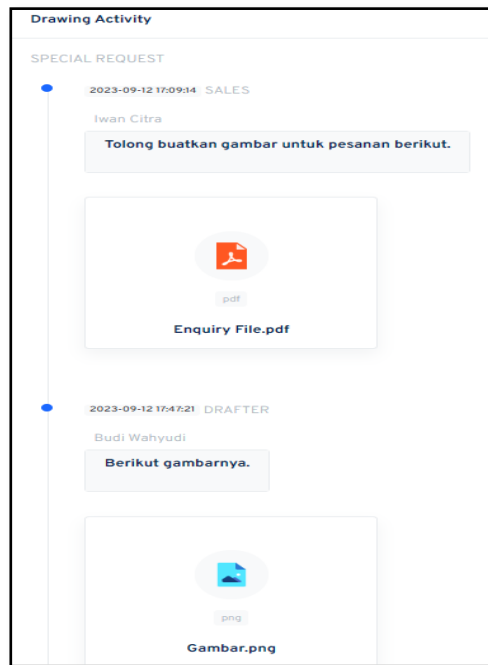
The screenshot shows a 'Drafting' interface for a 'Special Request to Drafter'. At the top, there is a 'Back' button. Below it, a green dot indicates 'Enquiry needs Drafting'. The main area is a rich text editor with a menu bar (File, Edit, Insert, View, Format) and a toolbar with icons for undo, redo, bold, italic, text color, background color, bulleted list, numbered list, link, and unlink. The text in the editor reads 'Tolong buat gambar untuk pesanan berikut.' Below the text is a text input field containing the letter 'p'. At the bottom, there is a section for attaching files, labeled 'Attach Drawing files *format pdf', with a 'Choose Files' button and the filename 'Enquiry File.pdf'. A blue 'submit' button is located at the bottom right.

15. Sales dapat melihat aktifitas permintaan gambar enquiry dengan team Drafter pada bagian **Drawing Activity**.

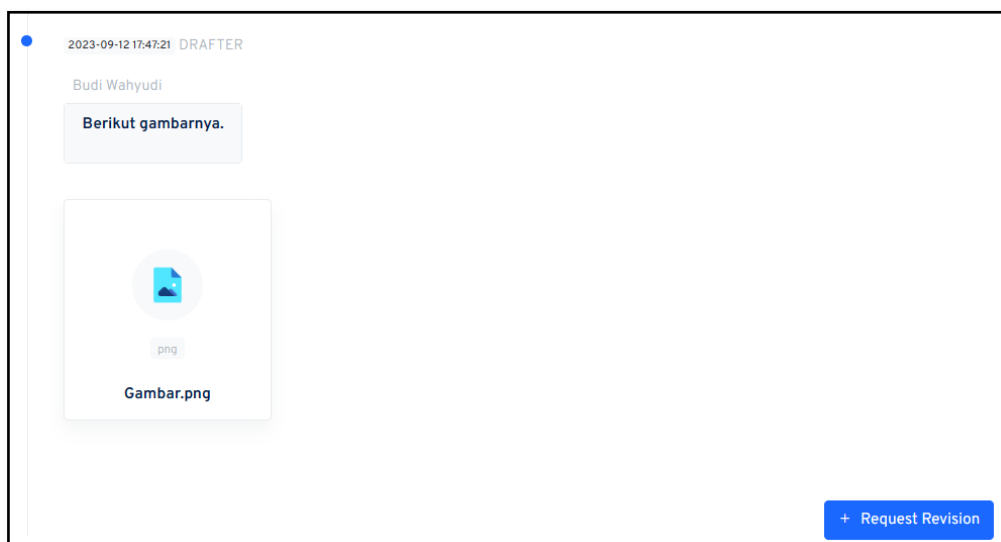


The screenshot shows a 'Drawing Activity' interface. At the top, it says 'DRAWING ACTIVITY'. Below that, there is a 'SPECIAL REQUEST' section. A blue dot indicates a new request. The request details include the date and time '2023-09-12 17:09:14', the user 'SALES', and the name 'Iwan Citra'. The request text is 'Tolong buat gambar untuk pesanan berikut.' Below the text is a file attachment icon (a red document with a white 'p') and the filename 'Enquiry File.pdf'. At the bottom right, there is a blue button with a plus sign and the text '+ Request Revision'.

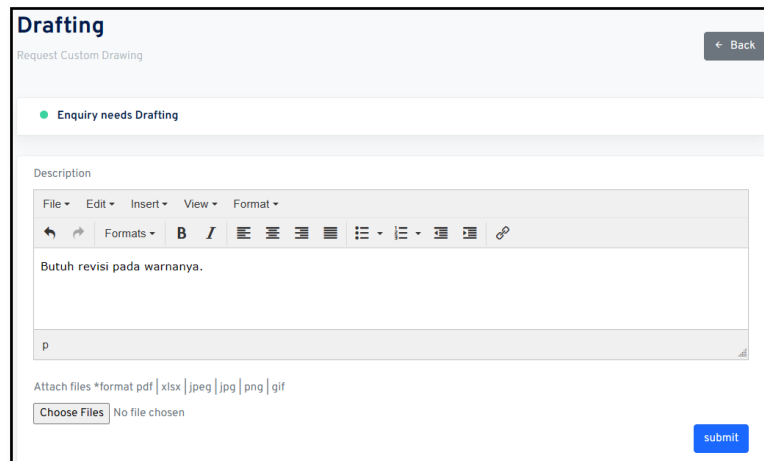
16. Apabila sudah dikirim ke team **Drafter**, sales menunggu hasil gambar untuk di kirim ke customer agar customer dapat melakukan Approve pada gambar tersebut.
17. Sales dapat melihat hasil gambar yang telah dibuat team **Drafter** pada bagian **Drawing Activity**.



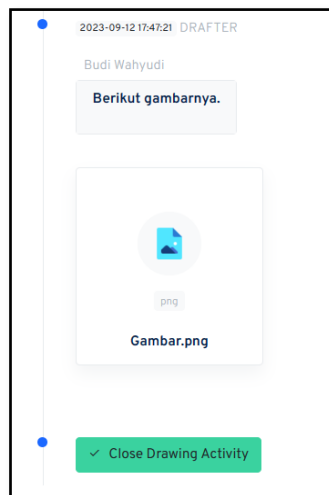
18. Sales dapat mengirim hasil gambar yang telah dibuat ke customer agar dapat mengetahui apakah gambar tersebut butuh revisi atau sudah sesuai permintaan customer.
19. Aktivitas tersebut dapat sales catat juga pada **Sales Activity**.
20. Apabila gambar tersebut butuh revisi, sales dapat mengirim kembali gambar tersebut pada bagian **Drawing Activity** >> **Request Revision**.



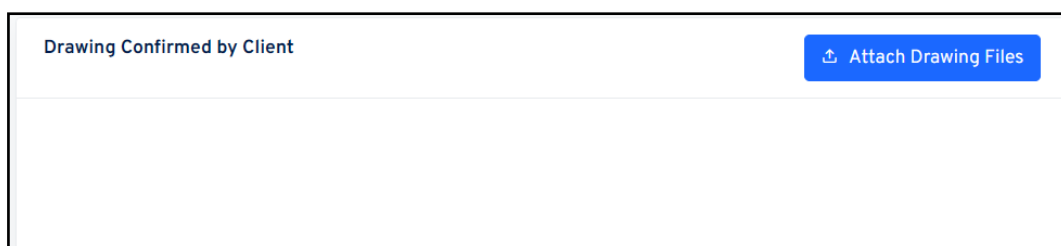
21. Sales dapat menjelaskan butuh revisi apa pada gambar tersebut dan melakukan **Submit**. (Attach File MAX 5MB).



22. Jika gambar sudah di setuju oleh customer, sales dapat menutup aktivitas ke team Drafter pada bagian **Drawing Activity >> Close Drawing Activity**.



23. Sales dapat menginput gambar yang telah di tandatangani oleh customer pada bagian **Drawing Confirmed by Client >> Attach Drawing Files**. (Attach File MAX 5MB).



24. Sales juga dapat menginput kontrak yang telah ditandatangani customer pada bagian **Contract Signed by Client >> Attach Contract Files.** (Attach File MAX 5MB).



25. Setelah semua file telah lengkap sales dapat melanjutkan untuk mendapatkan Approval dari sales Approval pada bagian **Assign >> Assign to Approval.**

