



MODUL SALES



Alpha Infotech International

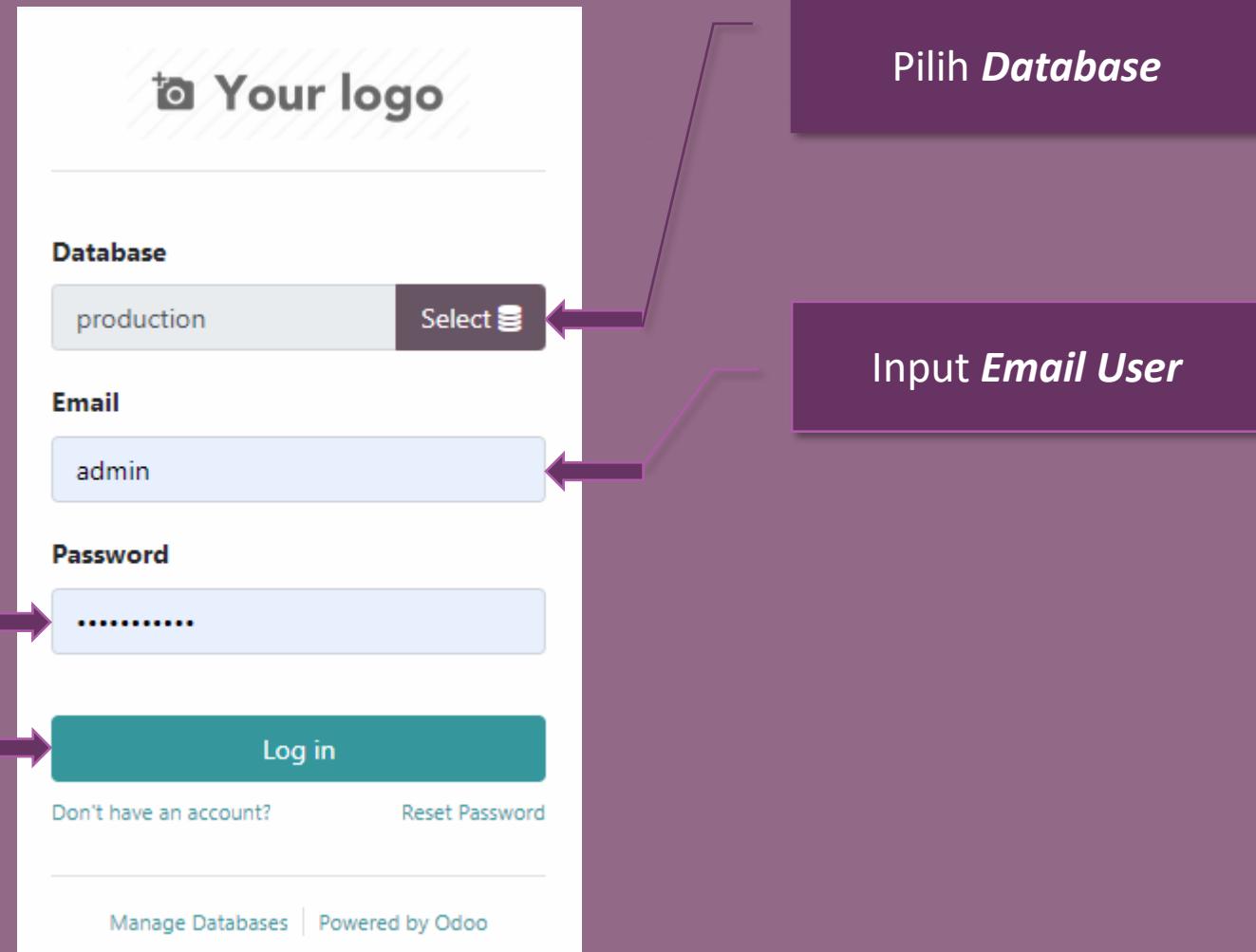
odoo

Daftar Isi

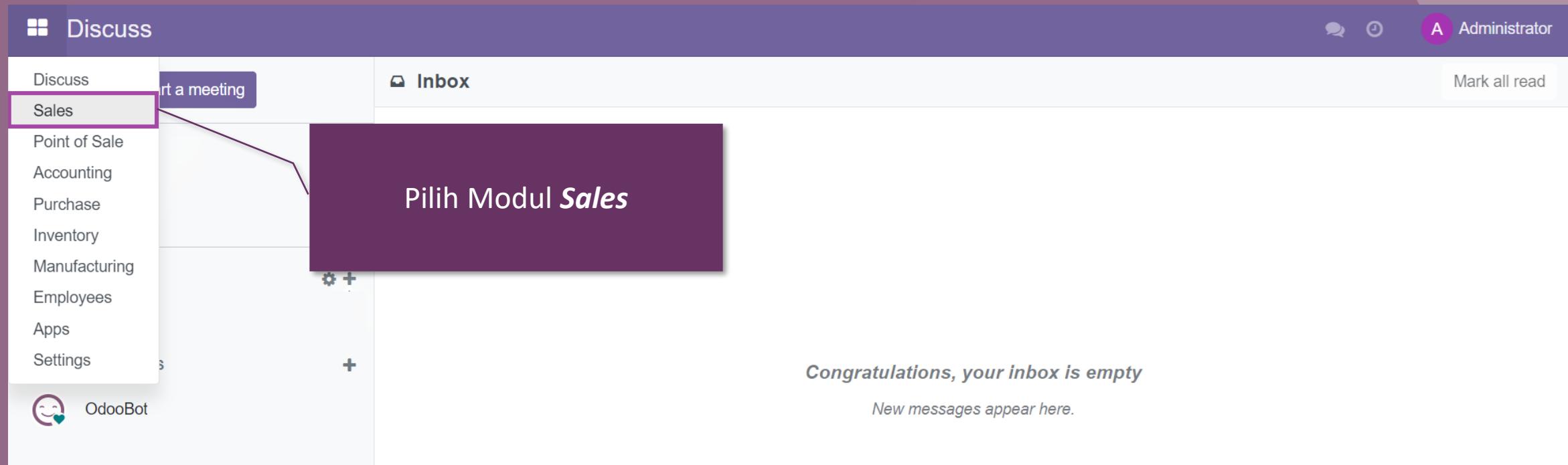
1. Proses Log In Database Hingga Memilih Modul Sales
2. Membuat Data Customer
3. Membuat Sales Team
4. Membuat Pricelist
5. Konfigurasi Tags (Menyimpan Data Merk dan Tipe Kendaraan)
6. Melihat Data Merk dan Tipe Kendaraan pada transaksi sales
7. Melihat Data Nomor Polisi pada transaksi sales
8. Membuat Quotation
9. Konfirmasi Quotation menjadi Sales Order
10. Mencatat Pengeluaran Barang (Delivery Order)
11. Membuat Customer Invoice
12. Menambahkan Discount “Fixed Amount” pada transaksi
13. Melihat Laporan Penjualan
14. Menyimpan Filter Pivot Laporan Penjualan
15. Revisi Sales Order

Proses *Log In Database* Hingga Memilih Modul Sales

Proses Log-In Database



Memilih Modul **Sales**



The screenshot shows the Odoo Discuss interface. On the left, a sidebar menu is open, listing various modules: Discuss, Sales (which is selected and highlighted in purple), Point of Sale, Accounting, Purchase, Inventory, Manufacturing, Employees, Apps, and Settings. A tooltip "Start a meeting" is visible near the "Sales" button. To the right of the sidebar is the main content area, which displays a large dark purple box with the text "Pilih Modul **Sales**". Below this box is a message: "Congratulations, your inbox is empty". At the bottom of the sidebar, there is an "OdooBot" icon.

Pilih Modul **Sales**

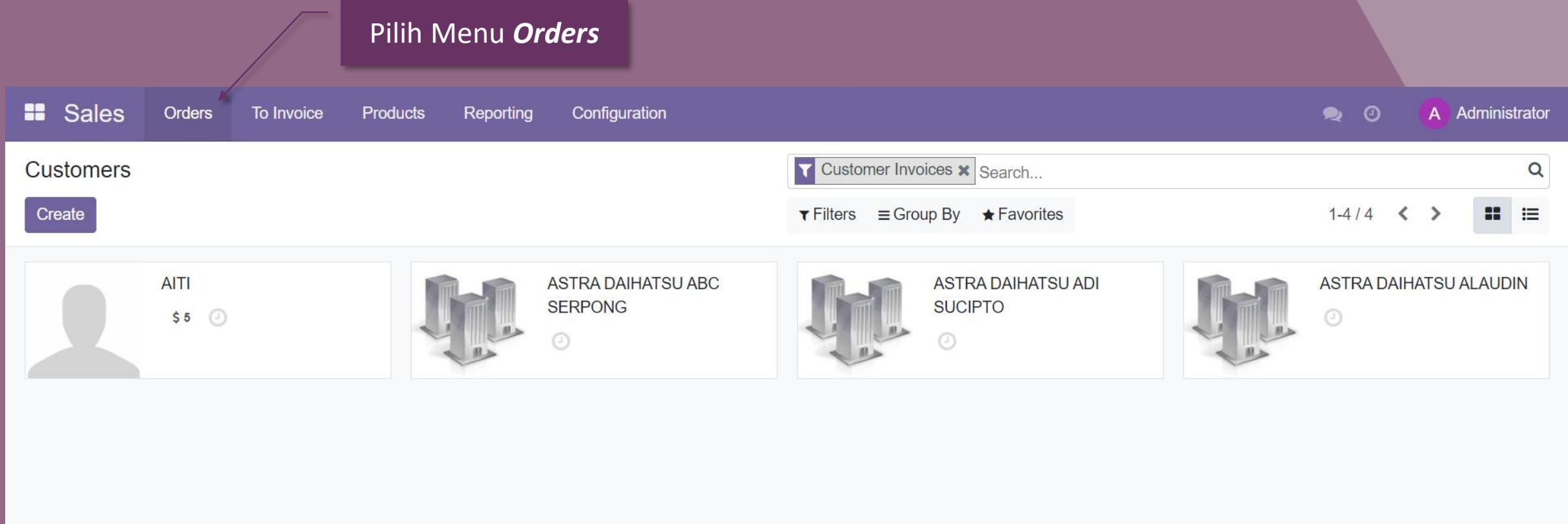
Congratulations, your inbox is empty

New messages appear here.

Membuat Data *Customer*

Membuat Data **Customer**

Pilih Menu **Orders**



Sales Orders To Invoice Products Reporting Configuration

Administrator

Customers

Customer Invoices Search...

Create Filters Group By Favorites 1-4 / 4

 AITI \$ 5	 ASTRA DAIHATSU ABC SERPONG	 ASTRA DAIHATSU ADI SUCIPTO	 ASTRA DAIHATSU ALAUDIN
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Membuat Data *Customer*

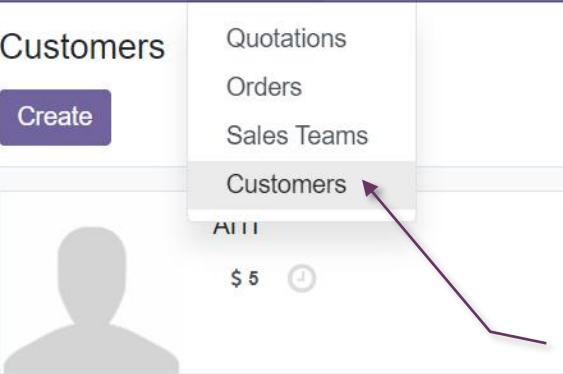
Sales Orders To Invoice Products Reporting Configuration A Administrator

Customers Quotations Orders Sales Teams Customers

Create

ASTRA DAIHATSU ABC SERPONG ASTRA DAIHATSU ADI SUCIPTO ASTRA DAIHATSU ALAUDIN

Pilih Menu *Customers*, untuk membuat dan melihat *customer*



Membuat Data *Customer*

Sales Orders To Invoice Products Reporting Configuration A Administrator

Customers Customer Invoices Search... Filters Group By Favorites 1-4 / 4

Create

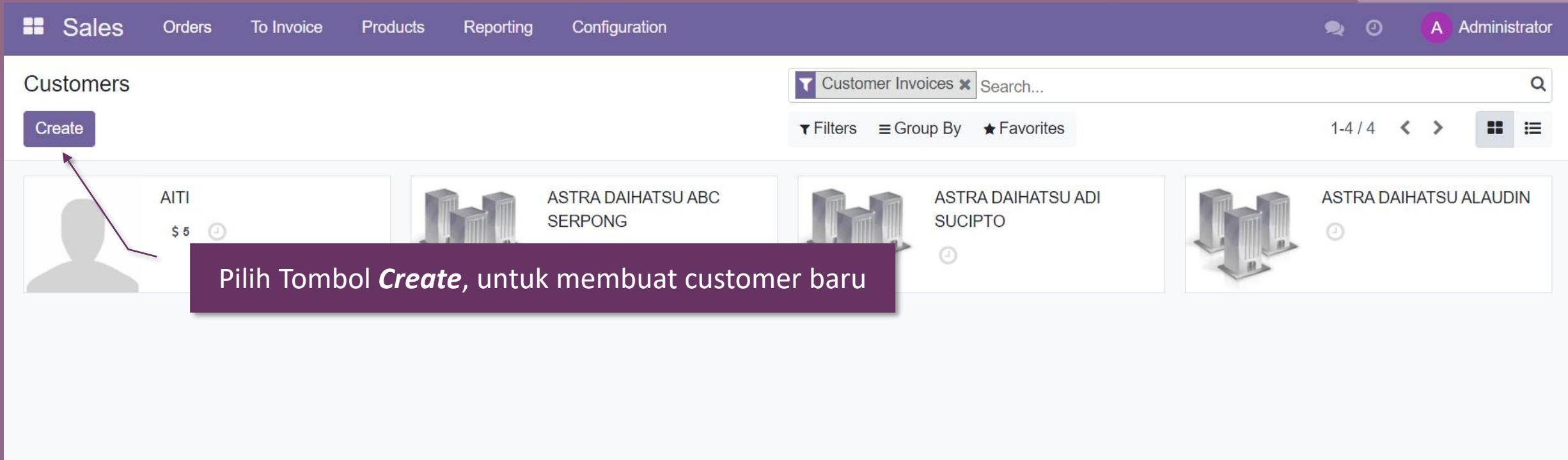
AITI \$ 5

ASTRA DAIHATSU ABC SERPONG

ASTRA DAIHATSU ADI SUCIPTO

ASTRA DAIHATSU ALAUDIN

Pilih Tombol *Create*, untuk membuat customer baru



Membuat Data *Customer*

Sales Orders To Invoice Products Reporting Configuration A Administrator

Customers / ASTRA DAIHATSU ASIA AFRIKA

Save Discard 1/1 < >

\$ 0 Sales	0 Purchases	No data yet On-time Rate	Rp 0.00 Invoiced	0 Vendor Bills
------------	-------------	--------------------------	------------------	----------------

Individual Company

ASTRA DAIHATSU ASIA AFRIKA 

Address Jl. Asia Afrika No.125, Kb. Pisang
Sumur Bandung
Bandung Jawa Barat (ID) 40112
Indonesia

VAT e.g. BE0477472701

ID PKP

Phone
Mobile
Email
Website e.g. <https://www.odoo.com>

Tags N 4454 XL SPIN  Tags...

Inputkan **Nama Customer** dan data pendukung lainnya sesuai dengan kebutuhan

Membuat Data *Customer*

Sales Orders To Invoice Products Reporting Configuration A Administrator

Customers / ASTRA DAIHATSU ASIA AFRIKA

Save Discard 1 / 1 < >

Contacts & Addresses Sales & Purchase Invoicing Internal Notes

Sales

Salesperson

Payment Terms 14 Hari

Pricelist Public Pricelist (IDR)

Point Of Sale

Barcode

Misc

Reference

Industry

Purchase

Payment Terms

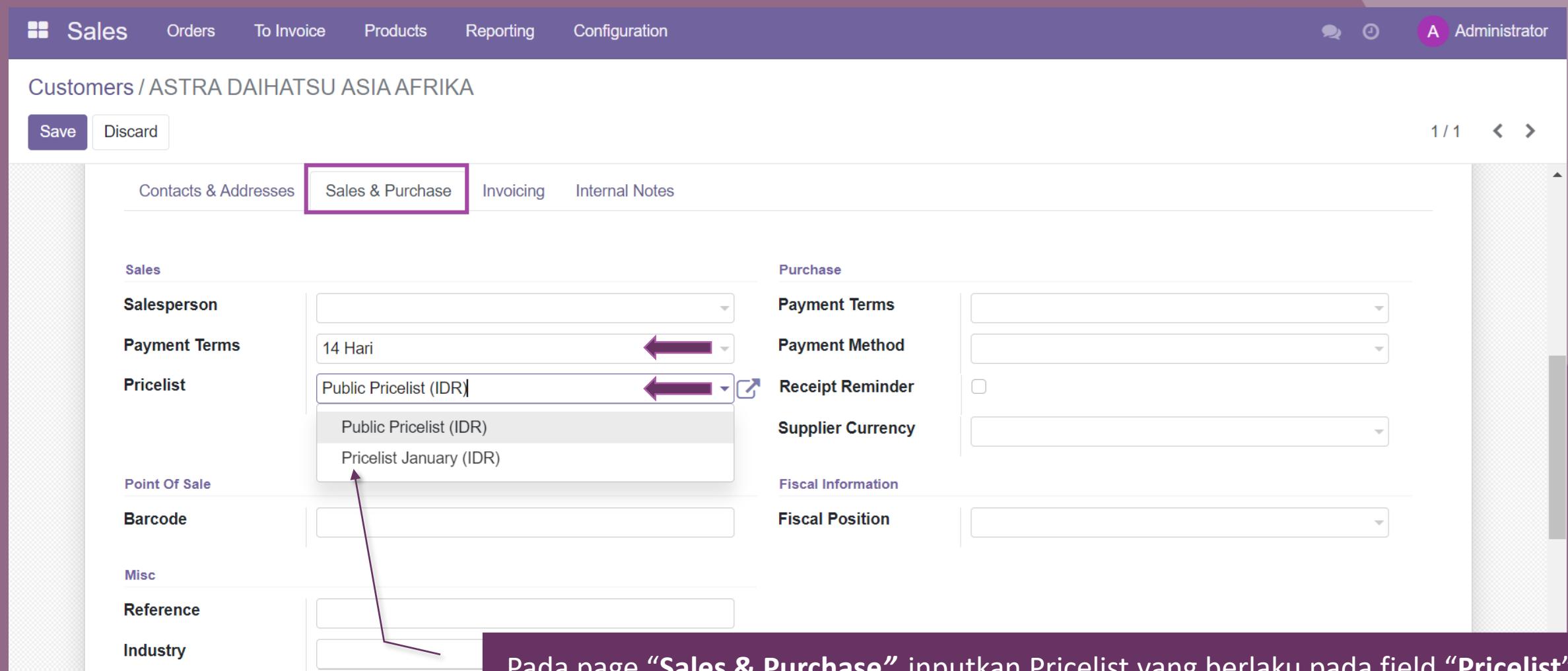
Payment Method

Receipt Reminder

Supplier Currency

Fiscal Information

Fiscal Position



Pada page “Sales & Purchase”, inputkan Pricelist yang berlaku pada field “Pricelist” dan data pendukung lainnya sesuai dengan kebutuhan

Membuat Data *Customer*

Sales Orders To Invoice Products Reporting Configuration A Administrator

Customers / ASTRA DAIHATSU ASIA AFRIKA

Save Discard

Contacts & Addresses Sales & Purchase Invoicing Internal Notes

Bank Accounts

Bank	Account Number
Add a line	

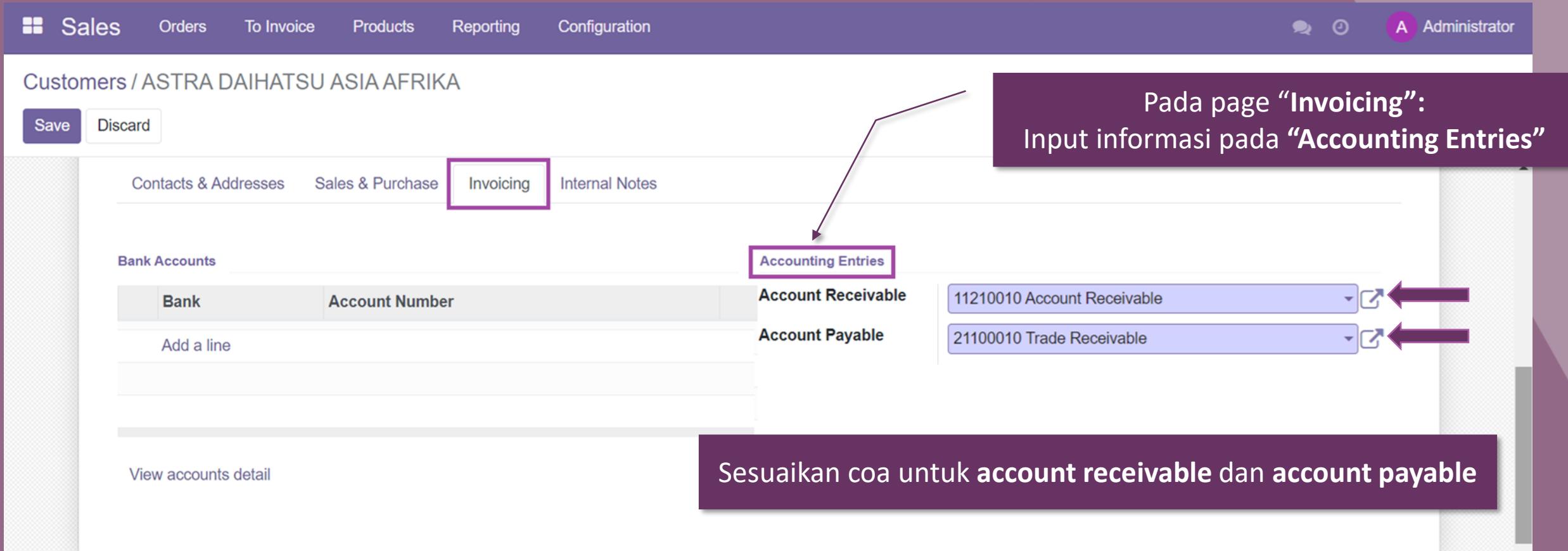
Account Receivable 11210010 Account Receivable ↗

Account Payable 21100010 Trade Receivable ↗

Pada page “Invoicing”:
Input informasi pada “Accounting Entries”

Accounting Entries

Sesuaikan coa untuk **account receivable** dan **account payable**



Membuat Data *Customer*

Sales Orders To Invoice Products Reporting Configuration A Administrator

Customers / ASTRA DAIHATSU ASIA AFRIKA

Save Discard 1/1 < >

Pilih tombol **Save** untuk menyimpan data *Customer*

Individual Company

ASTRA DAIHATSU ASIA AFRIKA



Address Jl. Asia Afrika No.125, Kb. Pisang
Sumur Bandung
Bandung Jawa Barat (ID) 40112
Indonesia

VAT e.g. BE0477472701

ID PKP

Phone
Mobile
Email
Website e.g. <https://www.odoo.com>

Tags N 4454 XL SPIN  Tags...

Membuat Data *Customer*

Sales Orders To Invoice Products Reporting Configuration   Administrator

Customers / ASTRA DAIHATSU ASIA AFRIKA

Edit Create Action 5 / 5 < >

Pilih tombol **Edit** untuk melakukan edit data *Customer*

Individual Company

ASTRA DAIHATSU ASIA AFRIKA



Address	Jl. Asia Afrika No.125, Kb. Pisang Sumur Bandung Bandung Jawa Barat (ID) 40112 Indonesia	Phone	
VAT		Mobile	
ID PKP	<input type="checkbox"/>	Email	
		Website	
		Tags	N 4454 XL SPIN X

Membuat Data *Customer*

Sales Orders To Invoice Products Reporting Configuration A Administrator

Customer Invoices Search... Filters Group By Favorites 1-5 / 5 < >  

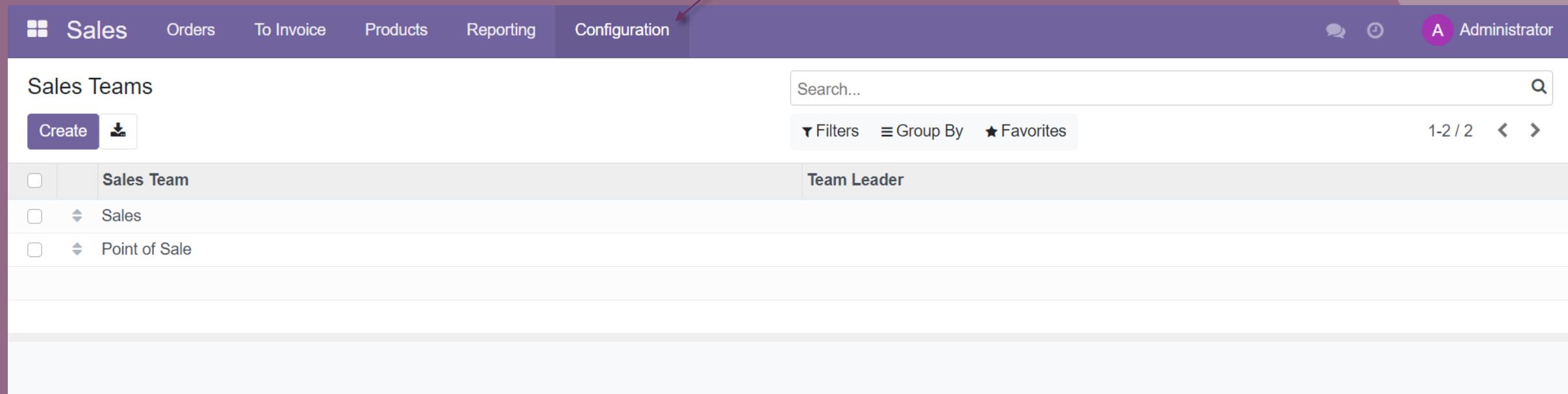
Customers Create

 AITI \$ 5	 ASTRA DAIHATSU ABC SERPONG	 ASTRA DAIHATSU ADI SUCIPTO	 ASTRA DAIHATSU ALAUDIN
 ASTRA DAIHATSU ASIA AFRIKA • N 4454 XL SPIN Bandung, Indonesia	<p><i>Customer</i> sudah terbuat dan tersimpan</p>		

Membuat *Sales Team*

Membuat **Sales Team**

Pilih Menu **Configuration**

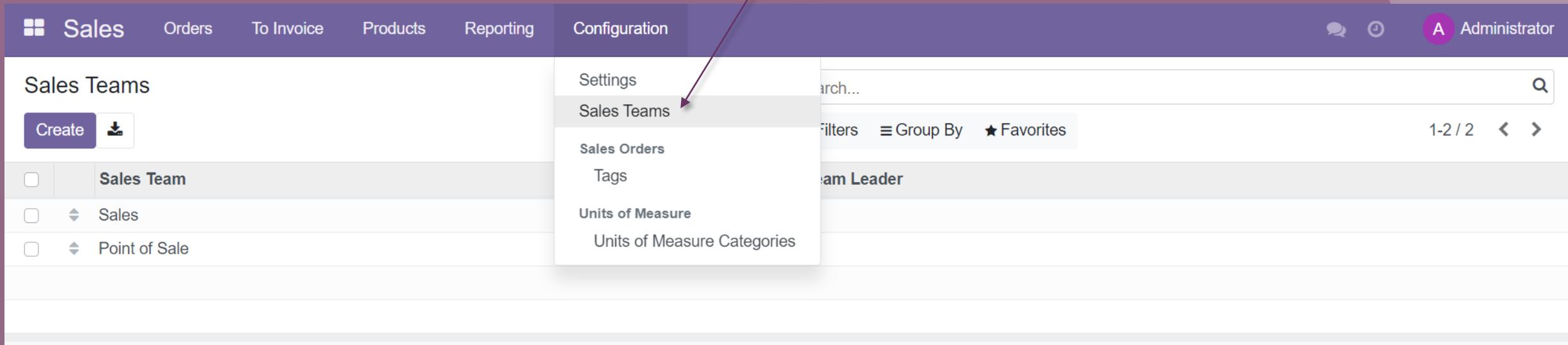


The screenshot shows the Odoo Sales module interface. At the top, there is a purple navigation bar with several menu items: Sales, Orders, To Invoice, Products, Reporting, Configuration, and Administrator. A purple arrow points from the text "Pilih Menu Configuration" to the "Configuration" menu item. Below the navigation bar is a white content area titled "Sales Teams". On the left side of this area, there is a "Create" button and a download icon. In the center, there is a search bar with the placeholder "Search..." and a magnifying glass icon. Below the search bar are three filter options: "Filters", "Group By", and "Favorites". On the right side, there is a page number "1-2 / 2" and navigation arrows. The main content area displays a table with two columns: "Sales Team" and "Team Leader". The first row shows "Sales Team" with a checkbox and "Team Leader" with a dropdown arrow. The second row shows "Point of Sale" with a checkbox and "Team Leader" with a dropdown arrow.

Sales Team	Team Leader
<input type="checkbox"/> Sales	▼
<input type="checkbox"/> Point of Sale	▼

Membuat **Sales Team**

Pilih Menu “**Sales Teams**”, untuk membuat **Sales Team**



The screenshot shows the Odoo Sales module interface. At the top, there is a purple header bar with the following navigation items: Sales, Orders, To Invoice, Products, Reporting, Configuration, and Administrator. A dropdown menu is open over the Configuration button, listing several options: Settings, Sales Teams (which is highlighted with a blue arrow), Sales Orders, Tags, Units of Measure, and Units of Measure Categories. Below the header, the main content area has a title "Sales Teams" and a "Create" button. There is also a small download icon. The main list displays three entries: "Sales Team", "Sales", and "Point of Sale".

Membuat **Sales Team**

Sales Teams

Pilih Tombol **Create**,
untuk membuat data **Sales Team** baru

	Sales Team	Team Leader
<input type="checkbox"/>	Sales	
<input type="checkbox"/>	Point of Sale	

Administrator

Membuat **Sales Team**

Sales Orders To Invoice Products Reporting Configuration Administrator

Sales Teams / New

Save Discard

Sales Team
e.g. North America

Quotations

Team Details

Team Leader

Invoicing Target Rp0.00

Members

Add

Input informasi pada field **Sales Team (Nama Sales Team)**, **Team Leader** dan **Add Member** untuk setiap customer sesuai dengan kebutuhan

Membuat **Sales Team**

Sales Teams / AUTO 2000 ASIA AFRIKA

Edit Create Action 3 / 3 < >

Sales Team
AUTO 2000 ASIA AFRIKA ←

Quotations

Team Details

Team Leader N Nathan ←

Invoicing Target Rp 20,000,000.00 / Month

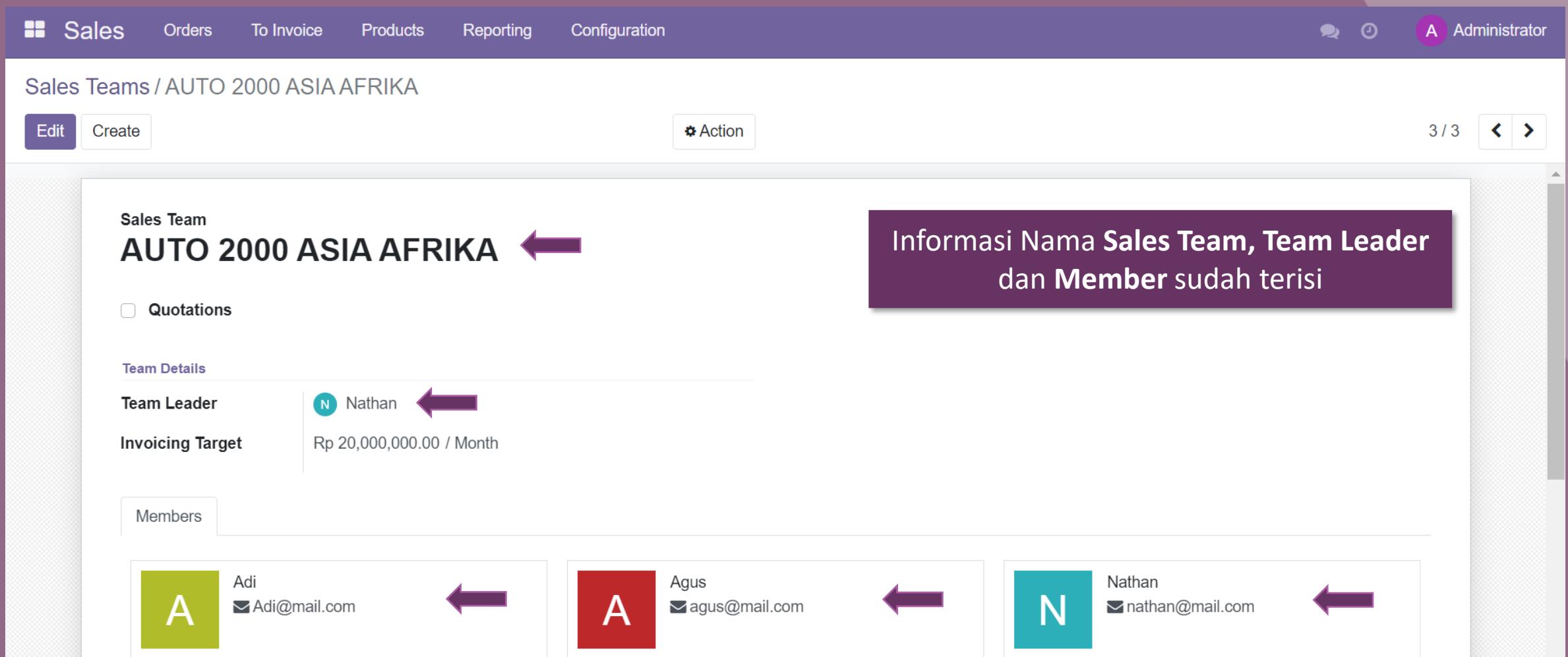
Members

A Adi Adi@mail.com ←

A Agus agus@mail.com ←

N Nathan nathan@mail.com ←

Informasi Nama **Sales Team**, **Team Leader** dan **Member** sudah terisi



Membuat **Sales Team**

Sales Orders To Invoice Products Reporting Configuration

Administrator

Sales Teams

Create 

Search... 

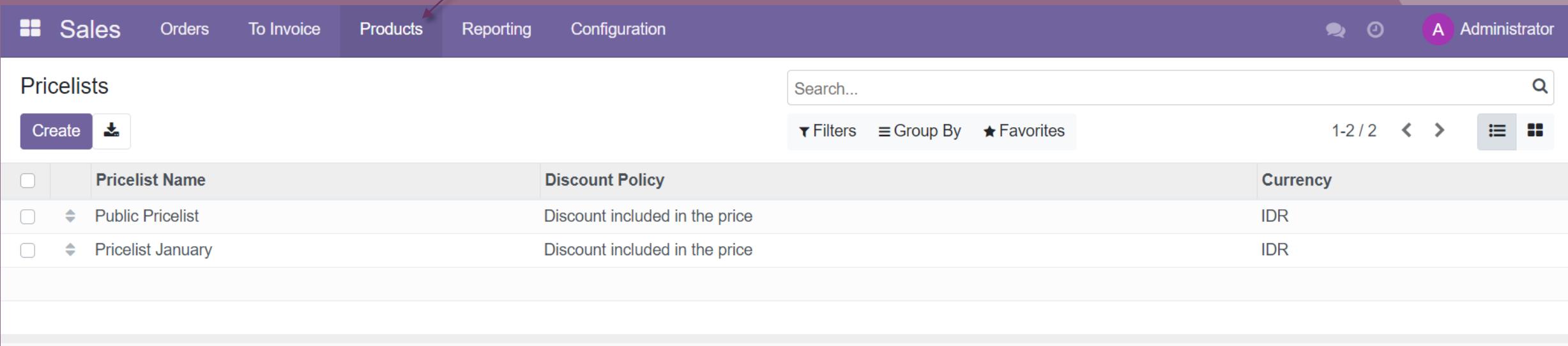
Filters Group By Favorites 1-3 / 3 < >

	Sales Team	Team Leader
<input type="checkbox"/>	Sales	
<input type="checkbox"/>	AUTO 2000 ASIA AFRIKA	Nathan
<input type="checkbox"/>	Point of Sale	

An arrow points from the text "Data Sales Team sudah terbuat dan tersimpan" to the "AUTO 2000 ASIA AFRIKA" row in the table.

Data **Sales Team** sudah terbuat dan tersimpan

Membuat *Pricelist*

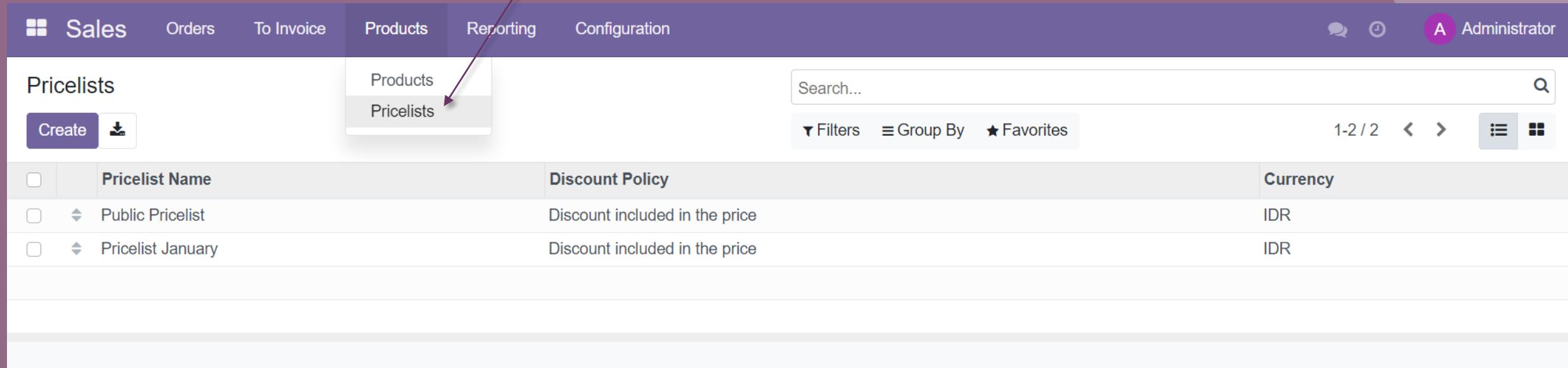
Membuat **Pricelist**Pilih Menu **Products**

The screenshot shows the Odoo Sales interface. At the top, there is a purple header bar with the following navigation items: Sales, Orders, To Invoice, Products (which is highlighted in blue), Reporting, Configuration, and an Administrator button. A purple arrow points from the text "Pilih Menu Products" to the "Products" button in the header. Below the header is a search bar with the placeholder "Search...". Underneath the search bar are three buttons: "Filters", "Group By", and "Favorites". To the right of these buttons are page navigation controls: "1-2 / 2", a left arrow, a right arrow, and two grid icons. The main content area is titled "Pricelists" and contains a table with the following data:

	Pricelist Name	Discount Policy	Currency
<input type="checkbox"/>	Public Pricelist	Discount included in the price	IDR
<input type="checkbox"/>	Pricelist January	Discount included in the price	IDR

Membuat *Pricelist*

Pilih Menu “*Pricelists*”,
untuk membuat *Pricelist*



The screenshot shows the Odoo Sales module interface. The top navigation bar includes links for Sales, Orders, To Invoice, Products, Reporting, Configuration, and an Administrator profile. A purple callout box points to the "Products" menu item, which is currently highlighted. Below the navigation, a search bar and filter options are visible. The main content area displays a list of existing pricelists:

	Pricelist Name	Discount Policy	Currency
<input type="checkbox"/>	Public Pricelist	Discount included in the price	IDR
<input type="checkbox"/>	Pricelist January	Discount included in the price	IDR

Membuat **Pricelist**

Sales Orders To Invoice Products Reporting Configuration A Administrator

Pricelists

Create 

Search... 

Filters Group By Favorites 1-2 / 2    

	Pricelist Name	Discount Policy	Currency
<input type="checkbox"/>	Public Pricelist	Discount included in the price	IDR
<input type="checkbox"/>	Pricelist January	Discount included in the price	IDR

Pilih Tombol **Create**,
untuk membuat data **Pricelist** baru

Membuat **Pricelist**

Sales Orders To Invoice Products Reporting Configuration

Administrator

Pricelists / New

Save Discard

Inputkan data **Pricelist** dengan menginputkan **Nama Pricelist, Products, Min. Quantity** dan **Price** sesuai dengan kebutuhan

Pricelist AUTO 2000 ASIA AFRIKA

Currency

IDR



Price Rules

Configuration

Products

Min. Quantit...

Price

Start Date

End Date

AC CARE

2.00

110,000.00 09/01/2024 07:00:00

09/15/2024 16:00:00



BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001

3.00

1,000,000.00



Add a line

Membuat **Pricelist**

Sales Orders To Invoice Products Reporting Configuration Administrator

Pricelists 

Create 

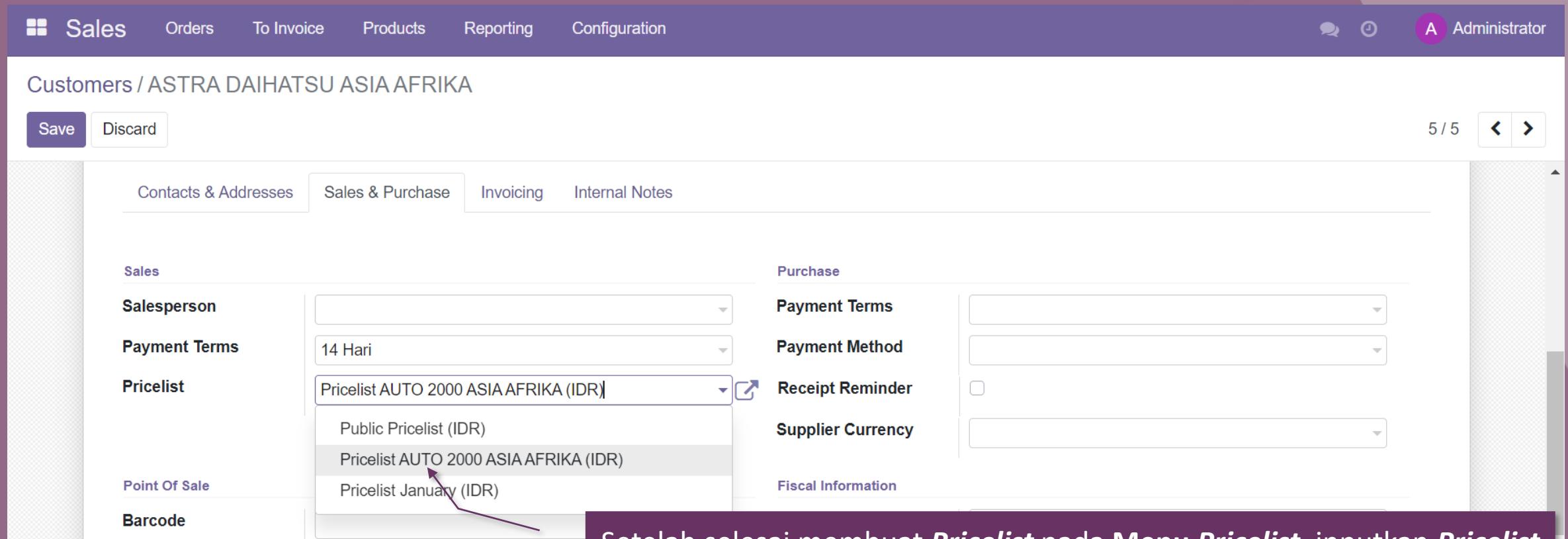
Filters Group By Favorites 1-3 / 3    

	Pricelist Name	Discount Policy	Currency
<input type="checkbox"/>	Public Pricelist	Discount included in the price	IDR
<input type="checkbox"/>	Pricelist AUTO 2000 ASIA AFRIKA	Discount included in the price	IDR
<input type="checkbox"/>	Pricelist January	Discount included in the price	IDR

Data **Pricelist** sudah terbuat dan tersimpan



Membuat **Pricelist**



The screenshot shows the Odoo Sales module interface. At the top, there is a navigation bar with tabs: Sales, Orders, To Invoice, Products, Reporting, Configuration, and a message icon. On the right side of the header, it says "Administrator". Below the header, the title "Customers / ASTRA DAIHATSU ASIA AFRIKA" is displayed. There are "Save" and "Discard" buttons on the left. The main area has tabs: Contacts & Addresses, Sales & Purchase, Invoicing, and Internal Notes. Under the Sales & Purchase tab, there are sections for Sales and Purchase. In the Sales section, there is a "Pricelist" field which is currently set to "Pricelist AUTO 2000 ASIA AFRIKA (IDR)". A dropdown menu is open over this field, showing three options: "Public Pricelist (IDR)", "Pricelist AUTO 2000 ASIA AFRIKA (IDR)" (which is highlighted), and "Pricelist January (IDR)". The Purchase section contains fields for Payment Terms, Payment Method, Receipt Reminder, Supplier Currency, and Fiscal Information. On the far right, there is a vertical scrollbar.

Setelah selesai membuat **Pricelist** pada **Menu Pricelist**, inputkan **Pricelist** yang telah dibuat pada Field **Pricelist** di Menu **Customers**

Dengan menginputkan informasi **Pricelist** pada menu **Customers**, harga produk untuk customer tersebut akan menyesuaikan dengan data harga yang telah ditetapkan pada menu **Pricelist**

Membuat **Pricelist**

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

Quotations / SO00057/JAVTEK/24/12/2024

Save Discard Send by Email Confirm Cancel 1 / 24 < >

SO00057/JAVTEK/24/12/2024

Customer: ASTRA DAIHATSU ASIAAFRIKA
JL. Asia Afrika No. 125, Kb. Pisang
Sumur Bandung
Bandung JB 40112
Indonesia

Expiration:

Pricelist: Pricelist AUTO 2000|ASIA AFRIKA (IDR)

Payment Terms:

Saat membuat transaksi sales, pilih terlebih dahulu nama **pricelist** yang akan diterapkan

Public Pricelist (IDR)
Pricelist AUTO 2000 ASIA AFRIKA (IDR)
Pricelist Bulan Desember (IDR)
Pricelist Bulan November (IDR)
Pricelist HRA Tire Service Lampung (IDR)
Pricelist HRA Tire Service Bojong Sari (IDR)
Pricelist HRA Bengkel Nawi (IDR)

Add a product Add a section Add a note

Maka harga *product* akan menyesuaikan dengan harga pada data yang telah dibuat pada Menu **Pricelist**

Membuat **Pricelist**

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

Quotations / SO00057/JAVTEK/24/12/2024

Save **Discard** 1 / 24 < >

Send by Email **Confirm** **Cancel** Quotation Quotation Sent Sales Order

Customer Preview

SO00057/JAVTEK/24/12/2024

Customer: ASTRA DAIHATSU ASIA AFRIKA
 JL. Asia Afrika No. 125, Kb. Pisang
 Sumur Bandung
 Bandung JB 40112
 Indonesia

Expiration
Pricelist: Pricelist AUTO 2000 ASIA AFRIKA (ID)
Payment Terms

Update Prices

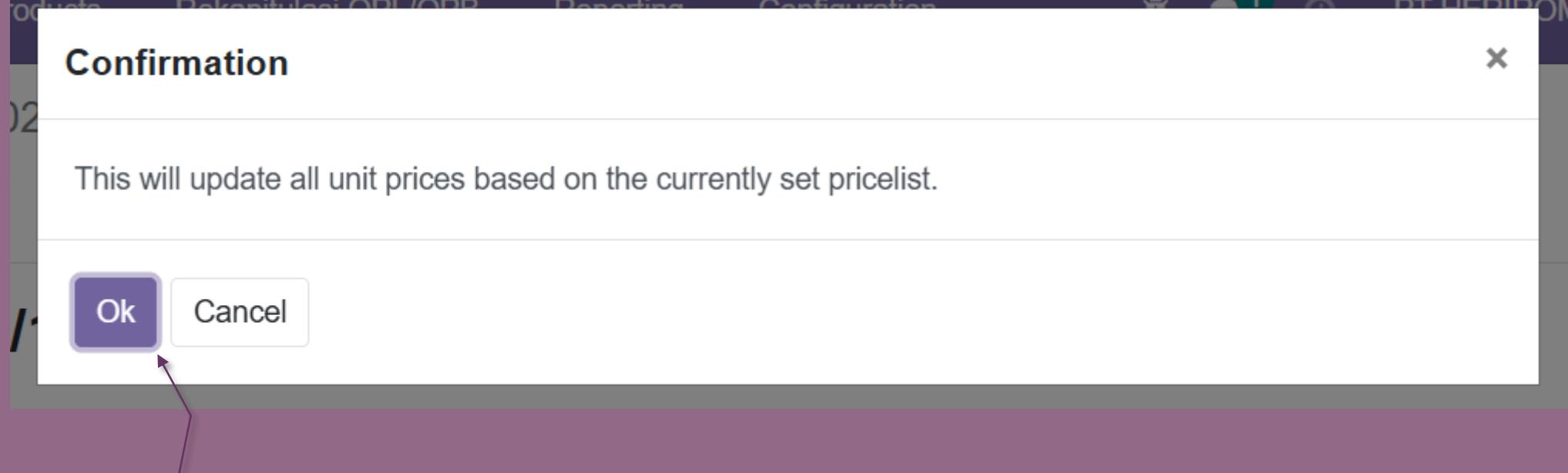
Order Lines Optional Products Other Info

Product	Description	Quantity	UoM	Unit Price	Taxes	Disc.%	Subtotal	⋮
[AC CARE] AC CARE	[AC CARE] AC CARE	1.00	Units	120,000.00		0.00	Rp 120,000.00	

Add a product Add a section Add a note

Apabila harga masih belum sesuai maka lakukan klik tombol "**Update Prices**" untuk memperbarui harga, dengan kasus product ditambahkan sebelum pricelist dipilih, atau terdapat pembaruan harga terbaru pada menu pricelist

Membuat **Pricelist**



Klik "OK"

Maka harga *product* akan menyesuaikan dengan harga pada data yang telah dibuat pada Menu **Pricelist**

Konfigurasi *Tags* (Menyimpan Data Merk dan Tipe Kendaraan)

Konfigurasi **Tags** (Menyimpan Data Merk dan Tipe Kendaraan)

Pilih Menu **Configuration**



Sales Orders To Invoice Products Reporting Configuration

Administrator

Tags

Create 

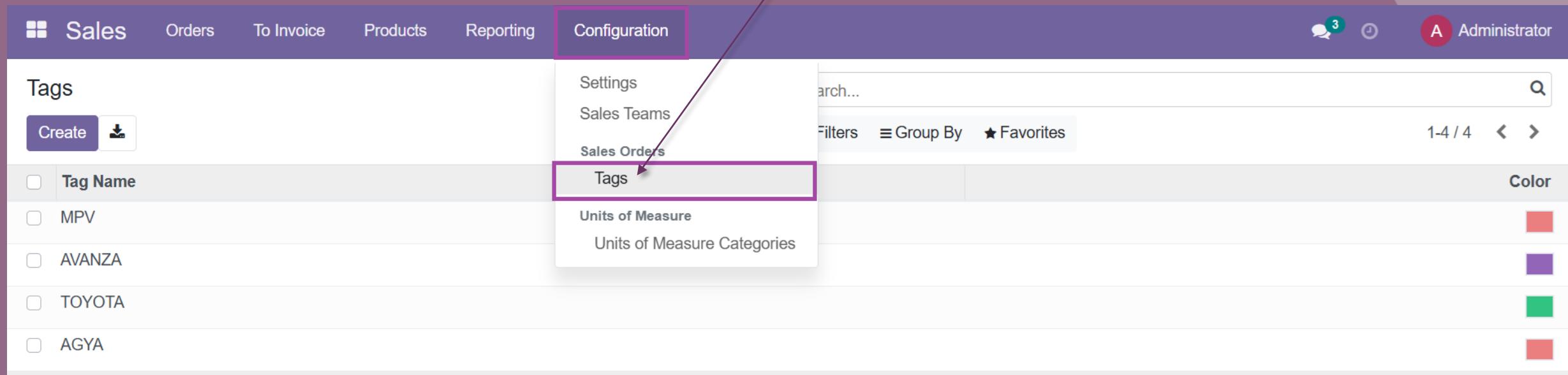
Search... 

Filters Group By Favorites 1-4 / 4 < >

<input type="checkbox"/>	Tag Name	Color
<input type="checkbox"/>	MPV	
<input type="checkbox"/>	AVANZA	
<input type="checkbox"/>	TOYOTA	
<input type="checkbox"/>	AGYA	

Konfigurasi **Tags** (Menyimpan Data Merk dan Tipe Kendaraan)

Pilih Menu “**Tags**”, untuk membuat data **Merk dan Tipe Kendaraan**



The screenshot shows the Odoo web interface with a purple header bar. The header includes navigation links: Sales, Orders, To Invoice, Products, Reporting, Configuration (which is highlighted with a pink box), and Administrator. On the right side of the header, there are notification icons (3 messages) and a user profile icon.

The main content area is titled "Tags". It features a "Create" button with a file icon and a search bar with placeholder text "Search...". Below the search bar are buttons for "Filters", "Group By", and "Favorites". A page navigation indicator shows "1-4 / 4" with back and forward arrows.

A table lists five entries under the "Tag Name" column:

Tag Name	Color
MPV	Red
AVANZA	Purple
TOYOTA	Green
AGYA	Red

To the right of the table, there is a vertical color palette with three colored squares: Red, Purple, and Green.

A dropdown menu is open over the "Configuration" link, listing several options: Settings, Sales Teams, Sales Orders, and Tags. The "Tags" option is highlighted with a pink box and has an arrow pointing to it from the explanatory text above.

Below the dropdown menu, there are additional links: Units of Measure and Units of Measure Categories.

Konfigurasi **Tags** (Menyimpan Data Merk dan Tipe Kendaraan)

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

Tags

Create 

Pilih Tombol **Create**,
untuk membuat data Merk dan Tipe Kendaraan baru

	Tag Name	Color
<input type="checkbox"/>	MPV	
<input type="checkbox"/>	AVANZA	
<input type="checkbox"/>	TOYOTA	
<input type="checkbox"/>	AGYA	

Konfigurasi **Tags** (Menyimpan Data Merk dan Tipe Kendaraan)

Sales Orders To Invoice Products Reporting Configuration

Administrator

Tags

Save Discard 

Search... 

Filters Group By Favorites

1-5 / 5  

Tag Name	Color
MPV	
AVANZA	
TOYOTA	
AGYA	
HONDA	

A large purple arrow points from the text "Ketikan data Merk dan Tipe Kendaraan sesuai dengan kebutuhan" to the "HONDA" entry in the table.

Ketikan data **Merk** dan **Tipe Kendaraan** sesuai dengan kebutuhan

Konfigurasi **Tags** (Menyimpan Data Merk dan Tipe Kendaraan)

Sales Orders To Invoice Products Reporting Configuration

Administrator

Tags

Save Discard 

Search... 

Filters Group By Favorites 1-5 / 5 < >

Tag Name	Color
MPV	
AVANZA	
TOYOTA	
AGYA	
HONDA	

→

Anda dapat menyesuaikan warna untuk setiap **Merk** dan **Tipe Kendaraan**

Konfigurasi **Tags** (Menyimpan Data Merk dan Tipe Kendaraan)

Sales	Orders	To Invoice	Products	Reporting	Configuration	3	Administrator
<h3>Tags</h3>							
Create						<input type="text"/> Search...	
						Filters	Group By
						Favorites	
						1-5 / 5	 
<input type="checkbox"/>	Tag Name						Color
<input type="checkbox"/>	MPV						
<input type="checkbox"/>	AVANZA						
<input type="checkbox"/>	TOYOTA						
<input type="checkbox"/>	AGYA						
<input type="checkbox"/>	HONDA						

Data Merk dan Tipe Kendaraan sudah terbuat dan tersimpan

Konfigurasi **Tags** (Menyimpan Data Merk dan Tipe Kendaraan)

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

Quotations / New

Save Discard

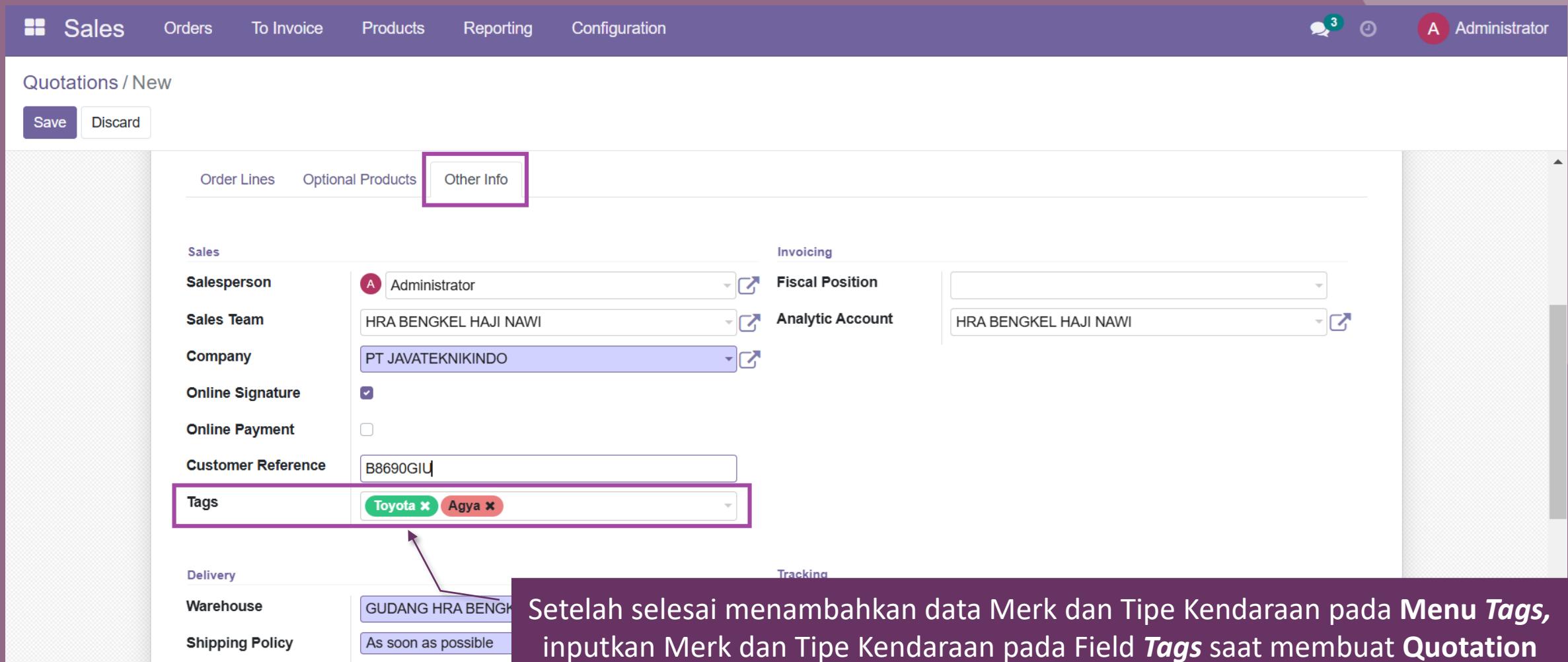
Order Lines Optional Products Other Info

Sales

Invoicing

Tags

Setelah selesai menambahkan data Merk dan Tipe Kendaraan pada **Menu Tags**,
inputkan Merk dan Tipe Kendaraan pada Field **Tags** saat membuat **Quotation**



Melihat Data **Merk** dan **Tipe Kendaraan** pada transaksi sales

Melihat Data Merk dan Tipe Kendaraan pada transaksi sales

Pada tampilan **Quotation** maupun **Sales Order**, pilih icon option untuk menampilkan kolom "Tags"

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

Quotations My Quotations Search... Filters Group By Favorites 1-22 / 22

<input type="checkbox"/>	Number	Creation Date	Customer	Salesperson	Next Activity	Company	Total	Status	⋮
<input type="checkbox"/>	SO00055/JAVTEK/20/12/2024	20/12/2024	ANDREAS	A Administrator	...	PT JAVATEKNIKINDO	Rp 500,000.00	Sales Order	⋮
<input type="checkbox"/>	SO00056/JAVTEK/20/12/2024	20/12/2024	BALAI BESAR PELATIHAN KESEHATAN JAKARTA	A Administrator	...	PT JAVATEKNIKINDO	Rp 90,000.00	Quotation	⋮
<input type="checkbox"/>	SO00054/JAVTEK/20/12/2024	20/12/2024	ARIN IBU	A Administrator	...	PT JAVATEKNIKINDO	Rp 500,000.00	Sales Order	⋮
<input type="checkbox"/>	SO00053/JAVTEK/20/12/2024	20/12/2024	ADING	A Administrator	...	PT JAVATEKNIKINDO	Rp 300,000.00	Sales Order	⋮
<input type="checkbox"/>	SO00046/JAVTEK/11/12/2024	11/12/2024	ADNAN SHOWROOM	A Administrator	...	PT JAVATEKNIKINDO	Rp 500,000.00	Sales Order	⋮
<input type="checkbox"/>	SO00050/JAVTEK/11/12/2024	11/12/2024	AGUS BUNTING	A Administrator	...	PT JAVATEKNIKINDO	Rp 2,000,000.00	Sales Order	⋮
<input type="checkbox"/>	SO00043/JAVTEK/10/12/2024	10/12/2024	ADING	A Administrator	...	PT JAVATEKNIKINDO	Rp 90,000.00	Sales Order	⋮
<input type="checkbox"/>	SO00028/JAVTEK/10/12/2024	10/12/2024	ADNAN SHOWROOM	A Administrator	...	PT JAVATEKNIKINDO	Rp 90,000.00	Sales Order	⋮

Melihat Data Merk dan Tipe Kendaraan pada transaksi sales

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

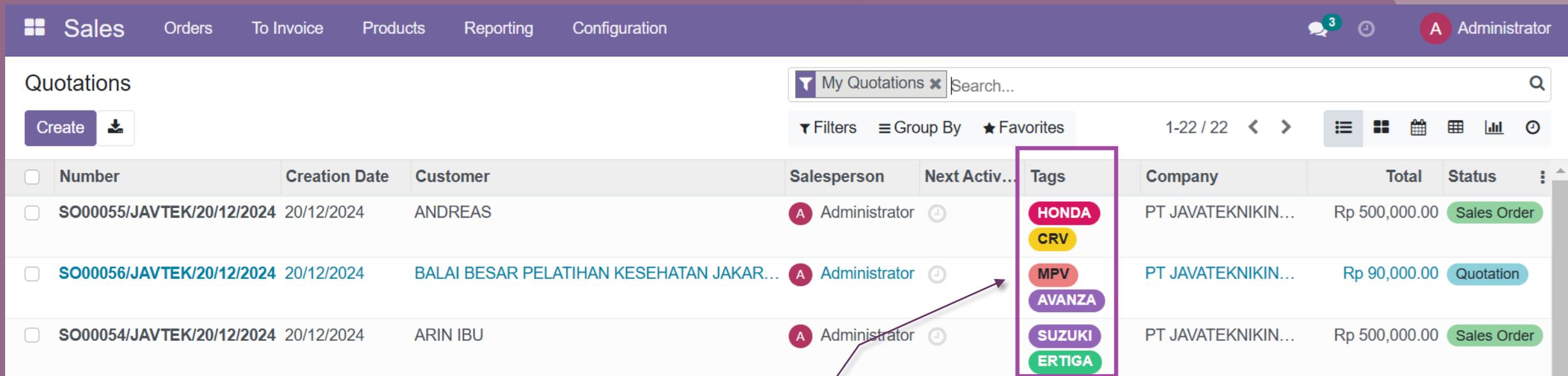
Quotations My Quotations Search... Filters Group By Favorites 1-22 / 22 Create Download

	Number	Creation Date	Customer	Salesperson	Next Activity	Company	Total	Status	⋮
<input type="checkbox"/>	SO00055/JAVTEK/20/12/2024	20/12/2024	ANDREAS	Administrator		PT JAVATEKNIKINDO	Rp 5,000,000	<input checked="" type="checkbox"/> Creation Date	
<input type="checkbox"/>	SO00056/JAVTEK/20/12/2024	20/12/2024	BALAI BESAR PELATIHAN KESEHATAN JAKARTA	Administrator		PT JAVATEKNIKINDO	Rp 5,000,000	<input type="checkbox"/> Delivery Date	
<input type="checkbox"/>	SO00054/JAVTEK/20/12/2024	20/12/2024	ARIN IBU	Administrator		PT JAVATEKNIKINDO	Rp 5,000,000	<input type="checkbox"/> Expected Date	
<input type="checkbox"/>	SO00053/JAVTEK/20/12/2024	20/12/2024	ADING	Administrator		PT JAVATEKNIKINDO	Rp 5,000,000	<input checked="" type="checkbox"/> Salesperson	
<input type="checkbox"/>	SO00046/JAVTEK/11/12/2024	11/12/2024	ADNAN SHOWROOM	Administrator		PT JAVATEKNIKINDO	Rp 5,000,000	<input type="checkbox"/> Activities	
<input type="checkbox"/>	SO00050/JAVTEK/11/12/2024	11/12/2024	AGUS BUNTING	Administrator		PT JAVATEKNIKINDO	Rp 2,000,000	<input type="checkbox"/> Sales Team	
<input type="checkbox"/>	SO00043/JAVTEK/10/12/2024	10/12/2024	ADING	Administrator		PT JAVATEKNIKINDO	Rp 5,000,000	<input type="checkbox"/> Tags	
<input type="checkbox"/>	SO00028/JAVTEK/10/12/2024	10/12/2024	ADNAN SHOWROOM	Administrator		PT JAVATEKNIKINDO	Rp 5,000,000	<input type="checkbox"/> Warehouse	
<input type="checkbox"/>	SO00040/JAVTEK/10/12/2024	10/12/2024	ADING	Administrator		PT JAVATEKNIKINDO	Rp 5,000,000	<input checked="" type="checkbox"/> Company	
<input type="checkbox"/>	SO00039/JAVTEK/10/12/2024	10/12/2024	ADNAN SHOWROOM	Administrator		PT JAVATEKNIKINDO	Rp 5,000,000	<input type="checkbox"/> Untaxed Amount	
<input type="checkbox"/>	SO00033/JAVTEK/10/12/2024	10/12/2024	Nathan Tjoe A On	Administrator		PT JAVATEKNIKINDO	Rp 5,000,000	<input type="checkbox"/> Taxes	
<input type="checkbox"/>	SO00032/JAVTEK/10/12/2024	10/12/2024	Nathan Tjoe A On	Administrator		PT JAVATEKNIKINDO	Rp 5,000,000	<input checked="" type="checkbox"/> Total	
<input type="checkbox"/>	SO00024/JAVTEK/10/12/2024	10/12/2024	ABDUL BP	Administrator		PT JAVATEKNIKINDO	Rp 5,000,000	<input checked="" type="checkbox"/> Status	

Pilih "Tags"

- Creation Date
- Delivery Date
- Expected Date
- Salesperson
- Activities
- Sales Team
- Tags
- Warehouse
- Company
- Untaxed Amount
- Taxes
- Total
- Status
- Invoice Status

Melihat Data Merk dan Tipe Kendaraan pada transaksi sales



The screenshot shows the Odoo Sales Quotations dashboard. At the top, there are navigation links: Sales, Orders, To Invoice, Products, Reporting, Configuration, and a message center with 3 notifications. The user is identified as Administrator. The main area displays a list of quotations with columns for Number, Creation Date, Customer, Salesperson, Next Activity, Tags, Company, Total, and Status. Three quotations are listed:

Number	Creation Date	Customer	Salesperson	Next Activ...	Tags	Company	Total	Status
SO00055/JAVTEK/20/12/2024	20/12/2024	ANDREAS	A Administrator		HONDA CRV	PT JAVATEKNIKIN...	Rp 500,000.00	Sales Order
SO00056/JAVTEK/20/12/2024	20/12/2024	BALAI BESAR PELATIHAN KESEHATAN JAKAR...	A Administrator		MPV AVANZA	PT JAVATEKNIKIN...	Rp 90,000.00	Quotation
SO00054/JAVTEK/20/12/2024	20/12/2024	ARIN IBU	A Administrator		SUZUKI ERTIGA	PT JAVATEKNIKIN...	Rp 500,000.00	Sales Order

An arrow points from a callout box at the bottom left to the 'Tags' column of the third quotation, highlighting the vehicle information.

Informasi **Merk** dan **Tipe Kendaraan** yang telah diinputkan saat pembuatan transaksi sales akan muncul pada kolom “**Tags**” di dashboard Quotation maupun Sales Order

Melihat Data **Nomor Polisi** pada transaksi sales

Melihat Data Nomor Polisi pada transaksi sales

Pada tampilan **Quotation** dan **Sales Order**

1. Pilih "Filter"

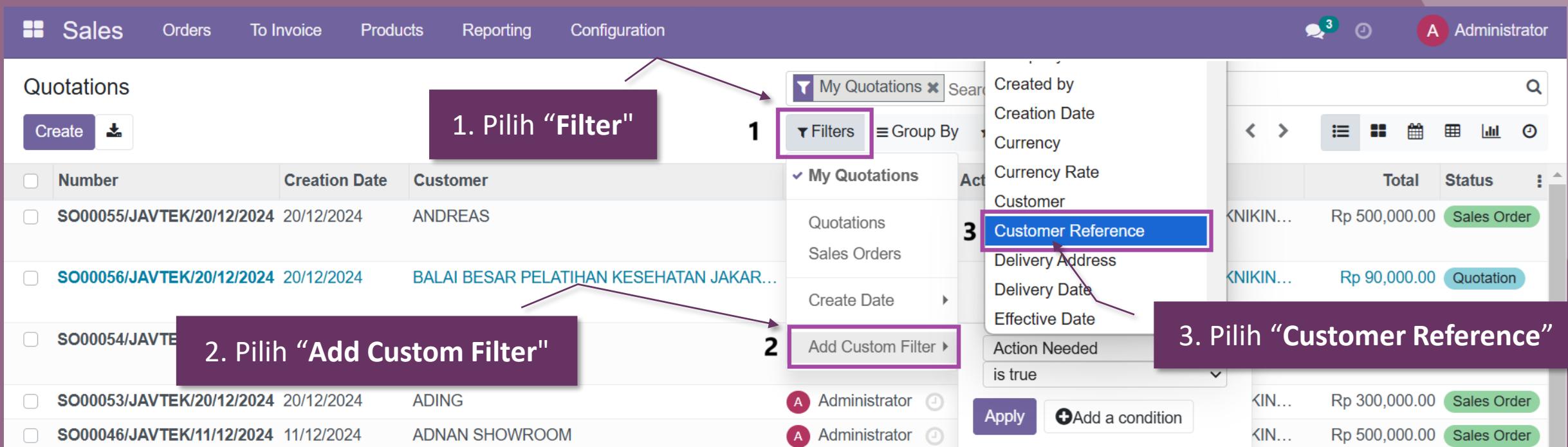
1. Pilih "Filter" (highlighted in purple)

2. Pilih "Add Custom Filter"

2. Pilih "Add Custom Filter" (highlighted in purple)

3. Pilih "Customer Reference"

3. Pilih "Customer Reference" (highlighted in blue)



Number	Creation Date	Customer
SO00055/JAVTEK/20/12/2024	20/12/2024	ANDREAS
SO00056/JAVTEK/20/12/2024	20/12/2024	BALAI BESAR PELATIHAN KESEHATAN JAKARTA
SO00054/JAVTEK/20/12/2024	20/12/2024	ADING
SO00053/JAVTEK/20/12/2024	20/12/2024	ADINAN SHOWROOM

Melihat Data Nomor Polisi pada transaksi sales

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

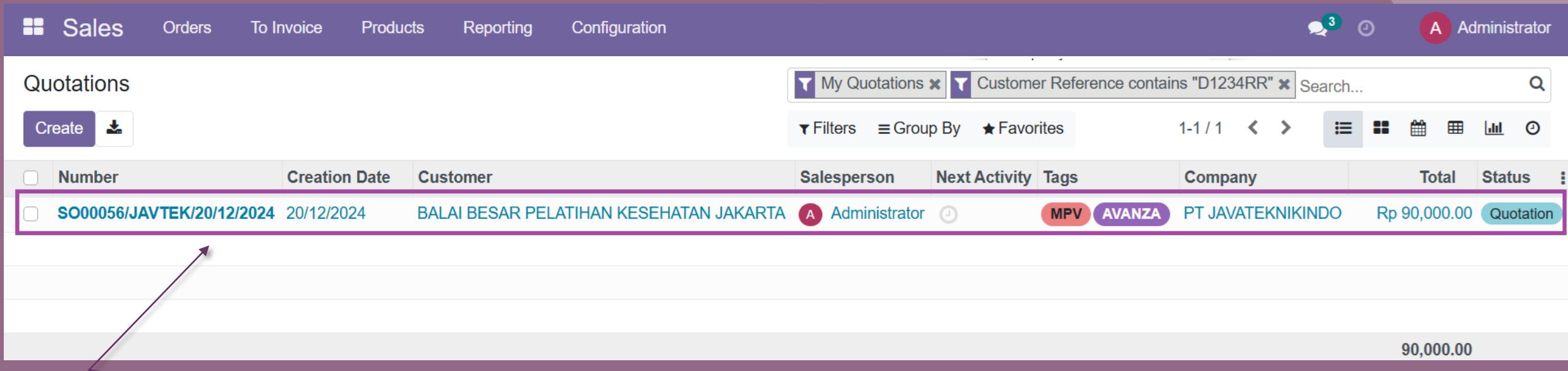
Quotations My Quotations Search... Filters Group By Favorites 1-22 / 22 Grid View

Number	Creation Date	Customer	Activ...	Tags	Company	Total	Status
SO00055/JAVTEK/20/12/2024	20/12/2024	ANDREAS	Quotations	HONDA CRV	PT JAVATEKNIKIN...	Rp 500,000.00	Sales Order
SO00056/JAVTEK/20/12/2024	20/12/2024	BALAI BESAR PELATIHAN KESEHATAN JAKAR...	Sales Orders	MPV AVANZA	PT JAVATEKNIKIN...	Rp 90,000.00	Quotation
SO00054/JAVTEK/20/12/2024	20/12/2024	ARIN IBU	Create Date		KIN...	Rp 500,000.00	Sales Order
SO00053/JAVTEK/20/12/2024	20/12/2024	ADING	Add Custom Filter >	Customer Reference contains	KIN...	Rp 300,000.00	Sales Order
SO00046/JAVTEK/11/12/2024	11/12/2024	ADNAN SHOWROOM		D1234RR	KIN...	Rp 500,000.00	Sales Order
SO00050/JAVTEK/11/12/2024	11/12/2024	AGUS BUNTING		Apply	KIN...	Rp 2,000,000.00	Sales Order

1. Inputkan "Nomor Polisi"

2. Pilih "Apply"

Melihat Data Nomor Polisi pada transaksi sales



The screenshot shows the Odoo Sales module interface. The top navigation bar includes links for Sales, Orders, To Invoice, Products, Reporting, Configuration, and a notifications icon with 3 messages. The user is identified as Administrator.

The main area displays a list of Quotations. A search bar at the top right contains two filters: "My Quotations" and "Customer Reference contains 'D1234RR'". Below the filters, there are buttons for Filters, Group By, Favorites, and a page indicator showing 1-1 / 1. The list view includes columns for Number, Creation Date, Customer, Salesperson, Next Activity, Tags, Company, Total, and Status. A specific quotation is highlighted with a purple border:

Number	Creation Date	Customer	Salesperson	Next Activity	Tags	Company	Total	Status
SO00056/JAVTEK/20/12/2024	20/12/2024	BALAI BESAR PELATIHAN KESEHATAN JAKARTA	A Administrator	MPV AVANZA	PT JAVATEKNIKINDO	Rp 90,000.00	Quotation	

An arrow points from the text in the callout box below to the Customer column of the highlighted quotation row.

Setelah menginputkan nomor polisi pada filter
"Customer Reference", semua transaksi
dengan nomor polisi tersebut akan muncul

Membuat *Quotation*

Membuat **Quotation**Pilih Menu **Orders**

Orders

Quotations

Create 

My Quotations  Search...

Filters Group By Favorites 1-5 / 5     

	Number	Creation Date	Customer	Salesperson	Next Activity	Total	Status
<input type="checkbox"/>	S00005	09/06/2024	AITI	 Administrator		Rp 111,000.00	Sales Order
<input type="checkbox"/>	S00004	09/05/2024	AITI	 Administrator		Rp 1,500,000.00	Quotation
<input type="checkbox"/>	S00003	09/05/2024	AITI	 Administrator		Rp 4,329,000.00	Quotation
<input type="checkbox"/>	S00002	09/05/2024	AITI	 Administrator		Rp 6,660,000.00	Sales Order
<input type="checkbox"/>	S00001	09/05/2024	AITI	 Administrator		Rp 6,560,000.00	Sales Order
						19,160,000.00	

Membuat *Quotation*

Pilih Menu “*Quotation*”,
untuk membuat *Quotation*

Sales	Orders	To Invoice	Products	Reporting	Configuration				A	Administrator									
Quotations	Quotations									My Quotations	Search...	Search							
										Filters	Group By	Favorites	1-5 / 5	<	>	Grid View	Calendar	Report	Help
	Number	Customers	Date	Customer	Salesperson	Next Activity	Total	Status											
<input type="checkbox"/>	S00005	09/06/2024	AITI	Administrator	Administrator	111,000.00	Rp 111,000.00	Sales Order	111,000.00	111,000.00	111,000.00	111,000.00							
<input type="checkbox"/>	S00004	09/05/2024	AITI	Administrator	Administrator	1,500,000.00	Rp 1,500,000.00	Quotation	1,500,000.00	1,500,000.00	1,500,000.00	1,500,000.00							
<input type="checkbox"/>	S00003	09/05/2024	AITI	Administrator	Administrator	4,329,000.00	Rp 4,329,000.00	Quotation	4,329,000.00	4,329,000.00	4,329,000.00	4,329,000.00							
<input type="checkbox"/>	S00002	09/05/2024	AITI	Administrator	Administrator	6,660,000.00	Rp 6,660,000.00	Sales Order	6,660,000.00	6,660,000.00	6,660,000.00	6,660,000.00							
<input type="checkbox"/>	S00001	09/05/2024	AITI	Administrator	Administrator	6,560,000.00	Rp 6,560,000.00	Sales Order	6,560,000.00	6,560,000.00	6,560,000.00	6,560,000.00							
												19,160,000.00							

Membuat **Quotation**

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations My Quotations Search... Filters Group By Favorites 1-5 / 5

Create 

Dalam dashboard awal, Pilih tombol **Create**

	Number	Creation Date	Customer	Salesperson	Next Activity	Total	Status	⋮
<input type="checkbox"/>	S00005	09/06/2024	AITI	 Administrator		Rp 111,000.00	Sales Order	
<input type="checkbox"/>	S00004	09/05/2024	AITI	 Administrator		Rp 1,500,000.00	Quotation	
<input type="checkbox"/>	S00003	09/05/2024	AITI	 Administrator		Rp 4,329,000.00	Quotation	
<input type="checkbox"/>	S00002	09/05/2024	AITI	 Administrator		Rp 6,660,000.00	Sales Order	
<input type="checkbox"/>	S00001	09/05/2024	AITI	 Administrator		Rp 6,560,000.00	Sales Order	
						19,160,000.00		

Membuat **Quotation**

Sales Orders To Invoice Products Reporting Configuration Administrator

Quotations / New

Save Discard

Send by Email Confirm Quotation Quotation Sent Sales Order

New

Customer Expiration Customer Preview

Pricelist

Payment Terms

Input informasi customer pada field **Customer**

Order Lines Optional Products Other Info

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮
Add a product	Add a section	Add a note						

Membuat Quotation

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / New

Save Discard Send by Email Confirm

Informasi pricelist dan payment terms akan terisi otomatis setelah customer diinputkan (dengan kondisi pricelist dan payment terms sudah diinputkan sebelumnya pada menu Customer)

New

Customer: ASTRA DAIHATSU ASIA AFRIKA
Jl. Asia Afrika No.125, Kb. Pisang
Sumur Bandung
Bandung JB 40112
Indonesia

Expiration: [empty]

Pricelist: Pricelist AUTO 2000 ASIA AFRIKA (IDR)

Payment Terms: 14 Hari

Order Lines Optional Products Other Info

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮
Add a product	Add a section	Add a note						

Membuat *Quotation*

Sales Orders To Invoice Products Reporting Configuration Administrator

Quotations / New

Save Discard

Send by Email Confirm Quotation Quotation Sent Sales Order

Customer Preview

New

Customer: ASTRA DAIHATSU ASIA AFRIKA
Jl. Asia Afrika No.125, Kb. Pisang
Sumur Bandung
Bandung JB 40112
Indonesia

Expiration:
Pricelist: Pricelist AUTO 2000 ASIA AFRIKA (IDR)
Payment Terms: 14 Hari

Untuk menambahkan produk pada *Quotation*,
pilih **Add a product** dalam kolom *Products*

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮
<input type="button" value="Add a product"/>	<input type="button" value="Add a section"/>	<input type="button" value="Add a note"/>						

Membuat *Quotation*

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / New

Save Discard

Send by Email Confirm

Quotation Quotation Sent Sales Order

Customer Preview

New

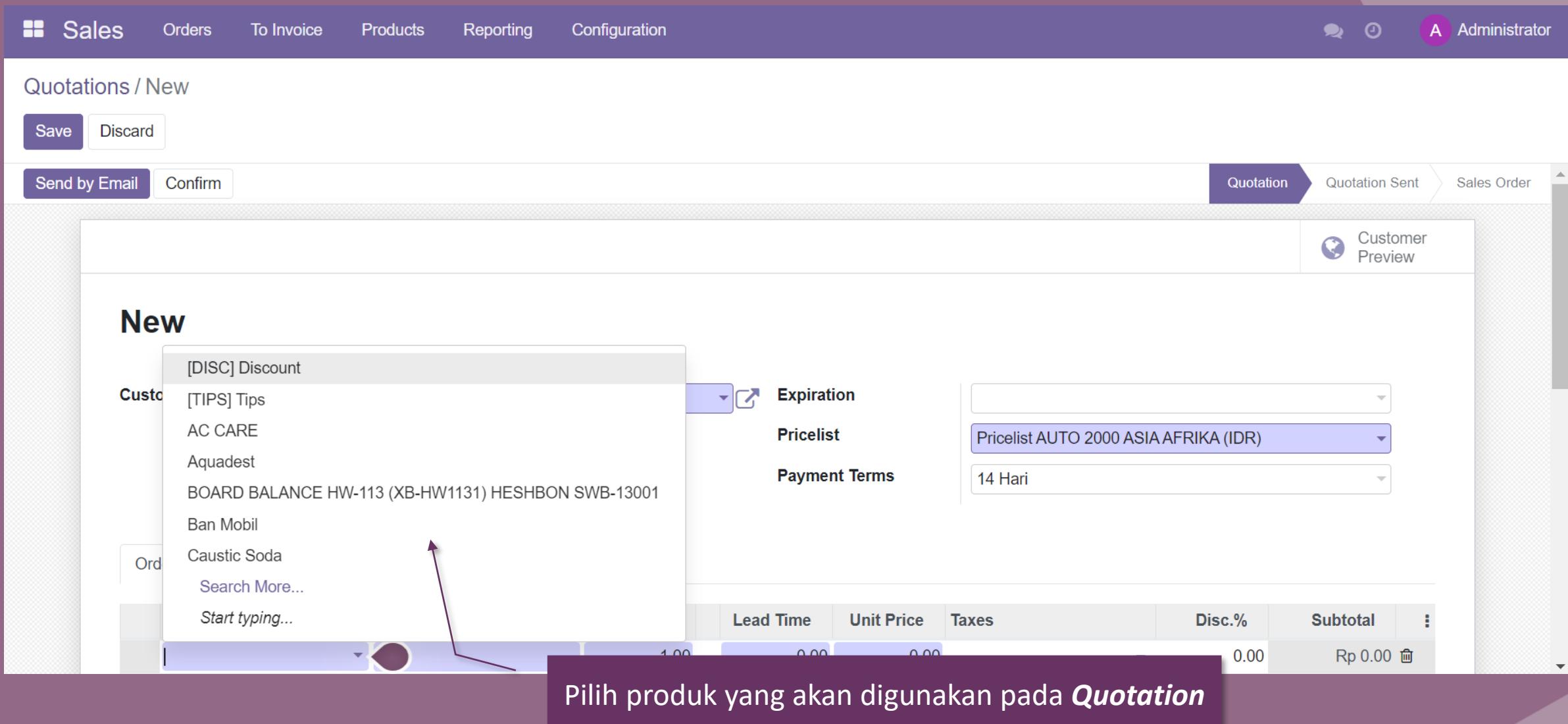
[DISC] Discount
[TIPS] Tips
AC CARE
Aquadest
BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001
Ban Mobil
Caustic Soda
Search More...
Start typing...

Expiration
Pricelist
Payment Terms

Lead Time Unit Price Taxes Disc.% Subtotal :

0.00 Rp 0.00

Pilih produk yang akan digunakan pada *Quotation*



Membuat **Quotation**

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / New

Save Discard

New

Customer ASTRA DAIHATSU ASIA AFRIKA
Jl. Asia Afrika No.125, Kb. Pisang
Sumur Bandung
Bandung JB 40112
Indonesia

Expir Price Payment

Lakukan penyesuaian pada **quantity, lead time, taxes** dan **discount** jika berlaku dalam transaksi. Informasi description dan unit price akan terisi otomatis sesuai dengan master data produk yang telah dibuat

Order Lines Optional Products Other Info

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮
BOARD BALANCE HW-1...	BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001	3.00	7.00	1,000,000.00	11%	0.00	Rp 3,000,000.00	⋮

Add a product Add a section Add a note

Membuat *Quotation*

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

Quotations / New

Save Discard

Order Lines Options Other Info

Sales

Salesperson: A Administrator

Sales Team: HRA BENGKEL HAJI NAWI

Company: PT JAVATEKNIKINDO

Online Signature:

Online Payment:

Customer Reference:

Tags:

Invoicing

Fiscal Position:

Analytic Account: HRA BENGKEL HAJI NAWI

Delivery

Warehouse: GUDANG HRA BENGKEL H.NAWI

Shipping Policy: As soon as possible

Tracking

Source Document:

Campaign:

Pada page “Other Info”, inputkan informasi **Sales Team**, **Analytic Account** dan **Warehouse** sesuai dengan **nama unit bisnis**

Membuat *Quotation*

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

Quotations / New

Save Discard

Order Lines Options Other Info

Sales

Salesperson: Administrator

Sales Team: HRA BENGKEL HAJI NAWI

Company: PT JAVATEKNIKINDO

Online Signature:

Online Payment:

Customer Reference: B8690GIU

Tags: Toyota x Agya x

Invoicing

Fiscal Position:

Analytic Account: HRA BENGKEL HAJI NAWI

Delivery

Warehouse: GUDANG HRA BENGKEL H.NAWI

Shipping Policy: As soon as possible

Tracking

Source Document:

Campaign:

Pada page “Other Info”, inputkan Nomor Polisi pada field “Customer Reference”

Membuat Quotation

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

Quotations / New

Save Discard

Order Lines Optional  Other Info

Sales

Salesperson: Administrator 

Sales Team: HRA BENGKEL HAJI NAWI 

Company: PT JAVATEKNIKINDO 

Online Signature:

Online Payment:

Customer Reference: B8690GIU

Invoicing

Fiscal Position: 

Analytic Account: HRA BENGKEL HAJI NAWI 

Tags:  Toyota  Agya 

Delivery

Warehouse: GUDANG HRA BENGKEL H.NAWI 

Shipping Policy: As soon as possible

Tracking

Source Document: 

Campaign: 

 Pada page “Other Info”, inputkan Merk dan Tipe Kendaraan pada field “Tags”

Membuat Quotation

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / New

Save Discard Send by Email Confirm Quotation Quotation Sent Sales Order Customer Preview

New Pilih tombol **Save**, untuk menyimpan quotation

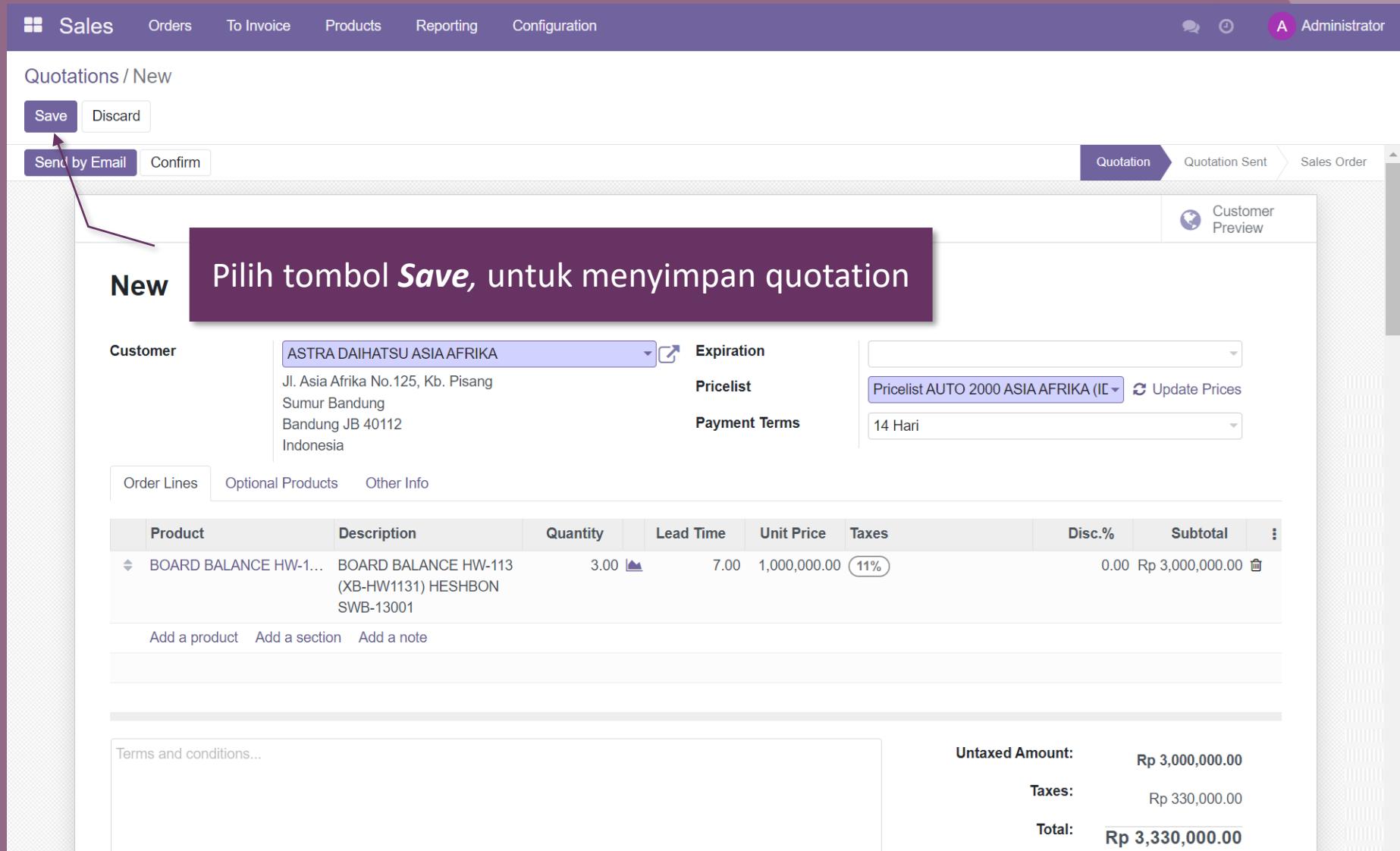
Customer ASTRA DAIHATSU ASIA AFRIKA Jl. Asia Afrika No.125, Kb. Pisang Sumur Bandung Bandung JB 40112 Indonesia Expiration Pricelist Pricelist AUTO 2000 ASIA AFRIKA (ID) Update Prices Payment Terms 14 Hari

Order Lines Optional Products Other Info

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮
BOARD BALANCE HW-1...	BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001	3.00	7.00	1,000,000.00	11%	0.00	Rp 3,000,000.00	

Add a product Add a section Add a note

Terms and conditions... Untaxed Amount: Rp 3,000,000.00 Taxes: Rp 330,000.00 Total: Rp 3,330,000.00



Membuat *Quotation*

Sales Orders To Invoice Products Reporting Configuration Administrator

Quotations / S00006

Edit Create Print Action 6 / 6 < >

Send by Email Confirm Cancel Quotation Quotation Sent Sales Order

Nomor transaksi atas *Quotation* terbuat

S00006

Customer ASTRA DAIHATSU ASIA AFRIKA
Jl. Asia Afrika No.125, Kb. Pisang
Sumur Bandung
Bandung JB 40112
Indonesia

Expiration Pricelist Payment Terms

Pricelist AUTO 2000 ASIA AFRIKA (IDR) Update Prices
14 Hari

Order Lines Optional Products Other Info

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮
BOARD BALANCE HW-113 (XB-HW1...	BOARD BALANCE HW-113 (XB-	3.00	7.00	1,000,000.00	(11%)	0.00	Rp 3,000,000.00	⋮

Konfirmasi *Quotation* menjadi *Sales Order*

Konfirmasi **Quotation** menjadi **Sales Order**

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / S00006

Edit Create Print Action 6 / 6 < >

Send by Email Confirm Cancel Quotation Quotation Sent Sales Order Customer Preview

S00006

Ketika data Quotation sudah benar, pilih tombol Confirm Order untuk melanjutkan proses Sales Order

Customer ASTRA DAIHATSU ASIA AFRIKA
Jl. Asia Afrika No.125, Kb. Pisang
Sumur Bandung
Bandung JB 40112
Indonesia

Expiration

Pricelist Pricelist AUTO 2000 ASIA AFRIKA (IDR) 

Payment Terms 14 Hari

Order Lines Optional Products Other Info

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮
BOARD BALANCE HW-113 (XB-HW1...	BOARD BALANCE HW-113 (XB-	3.00 	7.00	1,000,000.00 	11%	0.00	Rp 3,000,000.00 	⋮

Konfirmasi *Quotation* menjadi *Sales Order*

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / S00006

Edit Create Print Action 6 / 6 < >

Create Invoice Send by Email Cancel Quotation Quotation Sent Sales Order

S00006

Customer AST Jl. A Sumur Bandung Bandung JB 40112 Indonesia

Ketika tombol “**Confirm**” dipilih maka status “*Quotation*” berubah menjadi “*Sales Order*” dan dokumen *Delivery Order* terbuat
 (Dokumen *Delivery Order* terbuat apabila Tipe Product adalah *Storable* dan *Consumable*)

Payment Terms 14 Hari

Order Lines Other Info

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮
BOARD BALANCE HW-113 (XB-HW1...	BOARD BALANCE HW-113 (XB-	3.00	7.00	1,000,000.00	(11%)	0.00	Rp 3,000,000.00	⋮

Mencatat Pengeluaran Barang *(Delivery Order)*

Mencatat Pengeluaran Barang (*Delivery Order*)

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / S00006

Edit Create Print Action 6 / 6 < >

Create Invoice Send by Email Cancel Quotation Quotation Sent Sales Order

S00006

Customer ASTRA DAIHATU Jl. Asia Afrika No. 123, RT. 1/15
Sumur Bandung
Bandung JB 40112
Indonesia

Pricelist Pricelist AUTO 2000 ASIA AFRIKA (IDR)

Payment Terms 14 Hari

Untuk mencatat pengeluaran barang (*delivery order*) klik smart button “Delivery”

Order Lines Other Info

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮
BOARD BALANCE HW-113 (XB-HW1...	BOARD BALANCE HW-113 (XB-	3.00	7.00	1,000,000.00	(11%)	0.00	Rp 3,000,000.00	⋮

Mencatat Pengeluaran Barang (*Delivery Order*)

Sales Orders To Invoice Products Reporting Configuration

Administrator

Quotations / S00006 / WH/OUT/00005

Edit Create Print Action 1 / 1 < >

Validate Set quantities Print Print Labels Unreserve Scrap Unlock Cancel Draft Waiting Ready Done

★ WH/OUT/00005

Delivery Address	ASTRA DAIHATSU ASIA AFRIKA	Scheduled Date	09/18/2024 16:38:26
Source Location	WH/Stock	Deadline	09/18/2024 16:38:26
Product Availability Available			

Inputkan **quantity** product yang telah dikirim pada kolom “**Done**”

Detailed Operations	Operations	Additional Info	Note			
Product	From	From Owner	Reserved	Done	Unit of Measure	:
BOARD BALANCE HW-113 (XB-HW113) HESHBON SWB-13001	WH/Stock		3.00	0.00	Units	
Add a line						

Mencatat Pengeluaran Barang (*Delivery Order*)

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / S00006 / WH/OUT/00005

Save Discard 1 / 1 < >

Validate Set quantities Print Print Labels Unreserve Scrap Unlock Cancel Draft Ready Done

Setelah menyesuaikan *quantity* pada kolom “*Done*”, pilih tombol **Validate untuk validasi proses pengeluaran barang**

Delivery Address	ASTRA DAIHATSU ASIA AFRIKA	Scheduled Date	09/18/2024 16:38:26
Source Location	WH/Stock	Deadline	09/18/2024 16:38:26
		Product Availability	Available
		Source Document	S00006

Detailed Operations Operations Additional Info Note

Product	From	From Owner	Reserved	Done	Unit of Measure	⋮
BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001	WH/Stock		3.00	3.00	Units	
Add a line						

Mencatat Pengeluaran Barang (*Delivery Order*)

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / S00006 / WH/OUT/00005

Edit Create Print Action 1 / 1 < >

Print Labels Print Return Unlock Draft Waiting Ready Done

Valuation

★ WH/OUT/00005

Delivery Address: ASTRA DAIHATSU ASIA AFRIKA
Source Location: WH/Stock

Scheduled Date: 09/18/2024 16:38:26
Effective Date: 09/11/2024 16:50:08
Source Document: S00006

Detailed Operations Operations Additional Info Note

Product: BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001
WH/Stock: 0.00
Units: 3.00

Ketika tombol “**Validate**” dipilih maka status “**Ready**” berubah menjadi “**Done**”

Mencatat Pengeluaran Barang (*Delivery Order*)

Sales Orders To Invoice Products Reporting Configuration Administrator

Quotations / S00006 / WH/OUT/00005

Edit **Create** Print Action 1 / 1 < >

Print Labels Print Return Unlock Draft Waiting Ready Done

Pilih nomor urut SO untuk kembali pada view transaksi Sales Order

★ WH/OUT/00005

Delivery Address	ASTRA DAIHATSU ASIA AFRIKA	Scheduled Date	09/18/2024 16:38:26
Source Location	WH/Stock	Effective Date	09/11/2024 16:50:08
		Source Document	S00006

Detailed Operations Operations Additional Info Note

Product	From	From Owner	Reserved	Done	Unit of Measure	⋮
BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001	WH/Stock		0.00	3.00	Units	⋮

Membuat *Customer Invoice*

Membuat *Customer Invoice*

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / S00006

Edit Create Print Action 6 / 6 < >

Create Invoice Send by Email Cancel Quotation Quotation Sent Sales Order

S00006

Ketika barang sudah dikeluarkan, klik tombol “**Create Invoice**” untuk mendokumentasikan tagihan atas barang yang dijual

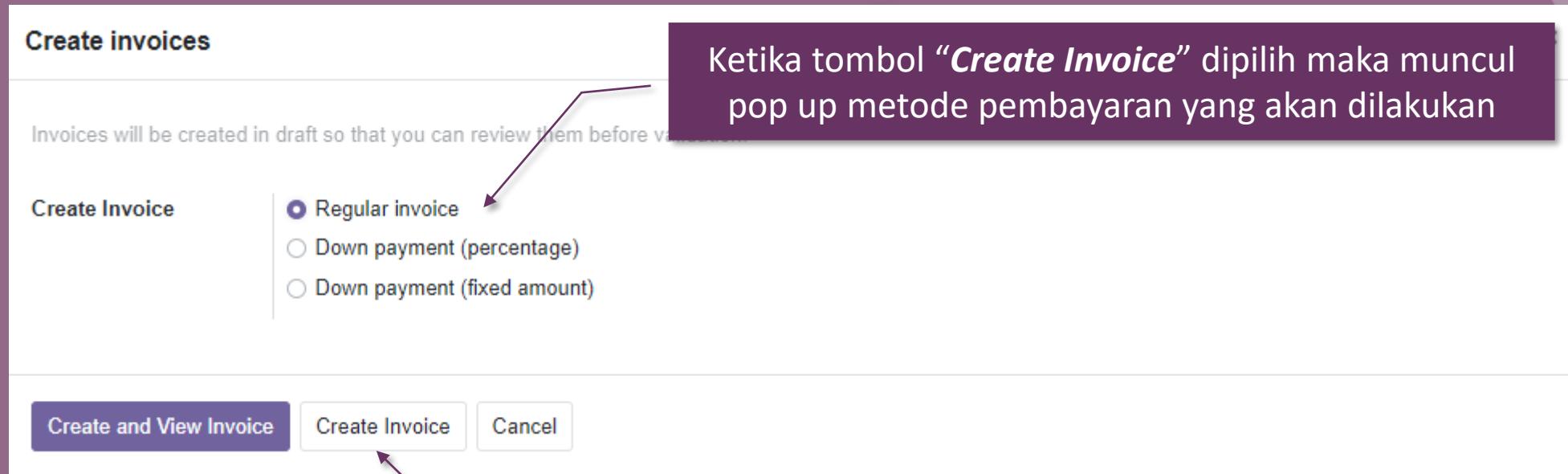
Customer ASTRA DAIHATSU ASIA AFRIKA
Jl. Asia Afrika No.125, Kb. Pisang
Sumur Bandung
Bandung JB 40112
Indonesia

Order Date 09/11/2024 16:38:26
Pricelist Pricelist AUTO 2000 ASIA AFRIKA (IDR)
Payment Terms 14 Hari

Order Lines Other Info

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮
BOARD BALANCE HW-113 (XB-HW1...	BOARD BALANCE HW-113 (XB-HW113) HESHRON SWB 13001	3.00	7.00	1,000,000.00	(11%)	0.00	Rp 3,000,000.00	⋮

Membuat *Customer Invoice*



Ketika tombol “*Create Invoice*” dipilih maka muncul pop up metode pembayaran yang akan dilakukan

Setelah data pembayaran selesai diinputkan,
pilih tombol “*Create Invoice*”

Membuat *Customer Invoice*

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / S00006

Edit Create Print Action 1 / 1 < >

Send by Email Cancel Quotation Quotation Sent Sales Order

S00006

Customer ASTRA DAIHATSU ASIA AFRIKA
Jl. Asia Afrika No.125, Kb. Pisang
Sumur Bandung
Bandung JB 40112
Indonesia

Order Date 09/11/2024 16:38:26
Pricelist Pricelist AUTO 2000 ASIA AFRIKA (IDR)
Payment Terms 14 Hari

Create Invoice 1 Invoices

Ketika tombol “*Create Invoice*” dipilih maka dokumen *Invoice* terbuat

Order Lines Other Info

Kemudian proses **Register Payment** akan dilakukan oleh tim keuangan melalui modul **Accounting** untuk mencatat pembayaran yang diterima atau dibayarkan

Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮
3.00	7.00	1,000,000.00	11%	0.00	Rp 3,000,000.00	

Menambahkan ***Discount “Fixed Amount”*** pada transaksi

Menambahkan **Discount “Fixed Amount”** pada transaksi

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

Quotations / New

Save Discard Send by Email Confirm Quotation Quotation Sent Sales Order Customer Preview

New

Customer: BALAI BESAR PELATIHAN KESEHATAN JAKARTA
Jl.Wijaya Kusuma No.45 Pondok Labu
Cilandak
Jakarta Selatan JK 12430
Indonesia

Expiration:
Pricelist: Public Pricelist (IDR)
Payment Terms: 14 Hari

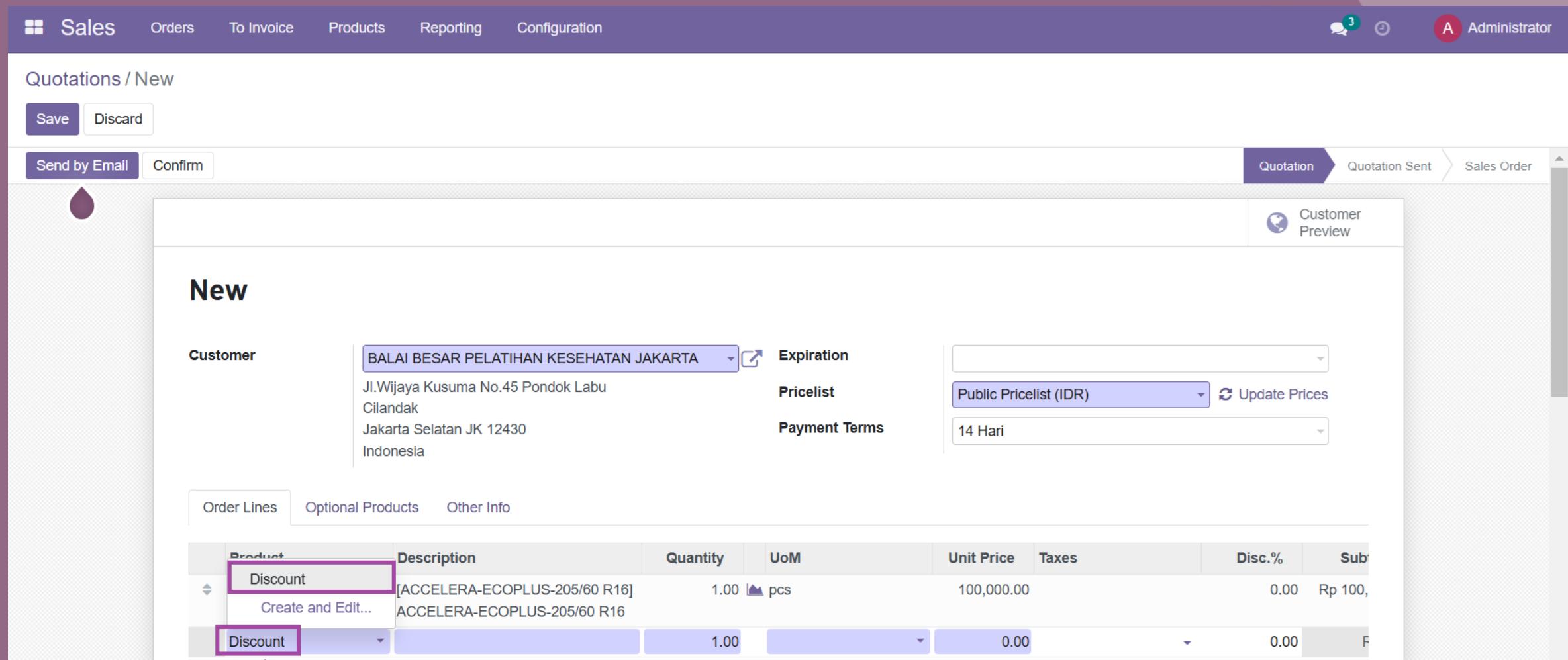
Order Lines Optional Products Other Info

Product	Description	Quantity	UoM	Unit Price	Taxes	Disc.%	Subtotal
[ACCELERA-ECOPLUS-205/60 R16] AC...	[ACCELERA-ECOPLUS-205/60 R16] ACCELERA-ECOPLUS-205/60 R16	1.00	pcs	100,000.00		0.00	Rp 100,000.00

Add a product Add a section Add a note

Klik “Add a Product” untuk menambahkan discount dengan jumlah tetap (**Fixed Amount**)

Menambahkan **Discount “Fixed Amount”** pada transaksi



Sales Orders To Invoice Products Reporting Configuration

Administrator

Quotations / New

Save Discard

Send by Email Confirm Quotation Quotation Sent Sales Order

New

Customer: BALAI BESAR PELATIHAN KESEHATAN JAKARTA

Expiration: [empty]

Pricelist: Public Pricelist (IDR)

Payment Terms: 14 Hari

Order Lines Optional Products Other Info

Product	Description	Quantity	UoM	Unit Price	Taxes	Disc.%	Subtotal
Discount	[ACCELERA-ECOPLUS-205/60 R16]	1.00	pcs	100,000.00		0.00	Rp 100,000.00
Discount	ACCELERA-ECOPLUS-205/60 R16	1.00		0.00		0.00	

Ketikan dan pilih “Discount” pada kolom pencarian

Menambahkan **Discount “Fixed Amount”** pada transaksi

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

Quotations / New

Save **Discard**

Send by Email **Confirm** **Quotation** Quotation Sent Sales Order

New

Customer: BALAI BESAR PELATIHAN KESEHATAN JAKARTA
Jl.Wijaya Kusuma No.45 Pondok Labu
Cilandak
Jakarta Selatan JK 12430
Indonesia

Expiration:
Pricelist: Public Pricelist (IDR)
Payment Terms: 14 Hari

Order Lines **Optional Products** **Other Info**

Product	Description	Quantity	UoM	Unit Price	Taxes	Disc.%	Subtotal	⋮
ACCELERA-ECOPLUS-205/60 R16	[ACCELERA-ECOPLUS-205/60 R16] ACCELERA-ECOPLUS-205/60 R16	1.00	pcs	100,000.00		0.00	Rp 100,000.00	
Discount	Discount	-1.00	Units	0.00		0.00	Rp 0.00	



Masukkan quantity dengan nilai **-1 (minus satu)**

Menambahkan **Discount “Fixed Amount”** pada transaksi

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

Quotations / New

Save **Discard**

Send by Email **Confirm**

Quotation **Quotation Sent** **Sales Order**

Customer Preview

New

Customer: BALAI BESAR PELATIHAN KESEHATAN JAKARTA
Jl.Wijaya Kusuma No.45 Pondok Labu
Cilandak
Jakarta Selatan JK 12430
Indonesia

Expiration:
Pricelist: Public Pricelist (IDR) **Update Prices**
Payment Terms: 14 Hari

Order Lines **Optional Products** **Other Info**

Product	Description	Quantity	UoM	Unit Price	Taxes	Disc.%	Subtotal	⋮
[ACCELERA-ECOPLU... [ACCELERA-ECOPLUS-205/60 R16]	ACCELERA-ECOPLUS-205/60 R16	1.00	pcs	100,000.00	0.00	Rp 100,000.00		
Discount	Discount	-1.00	Units	10000	0.00	Rp 0.00		

Masukkan **besaran discount** pada kolom **unit price** dengan nilai positif

Menambahkan **Discount “Fixed Amount”** pada transaksi

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

Quotations / New

New

Customer: BALAI BESAR PELATIHAN KESEHATAN JAKARTA
 Jl.Wijaya Kusuma No.45 Pondok Labu
 Cilandak
 Jakarta Selatan JK 12430
 Indonesia

Expiration:
Pricelist: Public Pricelist (IDR)
Payment Terms: 14 Hari

Total discount menjadi -10.000

Product	Description	Quantity	UoM	Unit Price	Taxes	Disc.%	Subtotal
[ACCELERA-ECOPLUS-205/60 R16]	ACCELERA-ECOPLUS-205/60 R16	1.00	pcs	100,000.00		0.00	Rp 100,000.00
Discount	Discount	-1.00	Units	10,000.00		0.00	Rp -10,000.00

Add a product Add a section Add a note

Terms and conditions... Total: Rp 90,000.00



Menambahkan ***Discount “Fixed Amount”*** pada transaksi

Sales Orders To Invoice Products Reporting Configuration 3 A Administrator

Quotations / New

Save Discard

New

Customer BALAI BESAR PELATIHAN KESEHATAN JAKARTA Expiration
 Jl.Wijaya Kusuma No.45 Pondok Labu
 Cilandak
 Jakarta Selatan JK 12430
 Indonesia

Pricelist Public Pricelist (IDR) Update Prices
14 Hari

Order Lines Optional Products Other Info

Product	Description	Quantity	UoM	Unit Price	Taxes	Disc.%	Subtotal	⋮
[ACCELERA-ECOPLUS-205/60 R16]	[ACCELERA-ECOPLUS-205/60 R16] ACCELERA-ECOPLUS-205/60 R16	1.00	pcs	100,000.00		0.00	Rp 100,000.00	
Discount	Discount	-1.00	Units	10,000.00		0.00	Rp -10,000.00	
Add a product Add a section Add a note								
Terms and conditions...							Total: Rp 90,000.00	

Kemudian, lakukan proses confirm order,
 delivery order, dan create invoice seperti biasa

Setelah menambahkan discount, total akan menyesuaikan
 dengan nilai discount yang diterapkan

Melihat Laporan Penjualan

Melihat Laporan Penjualan

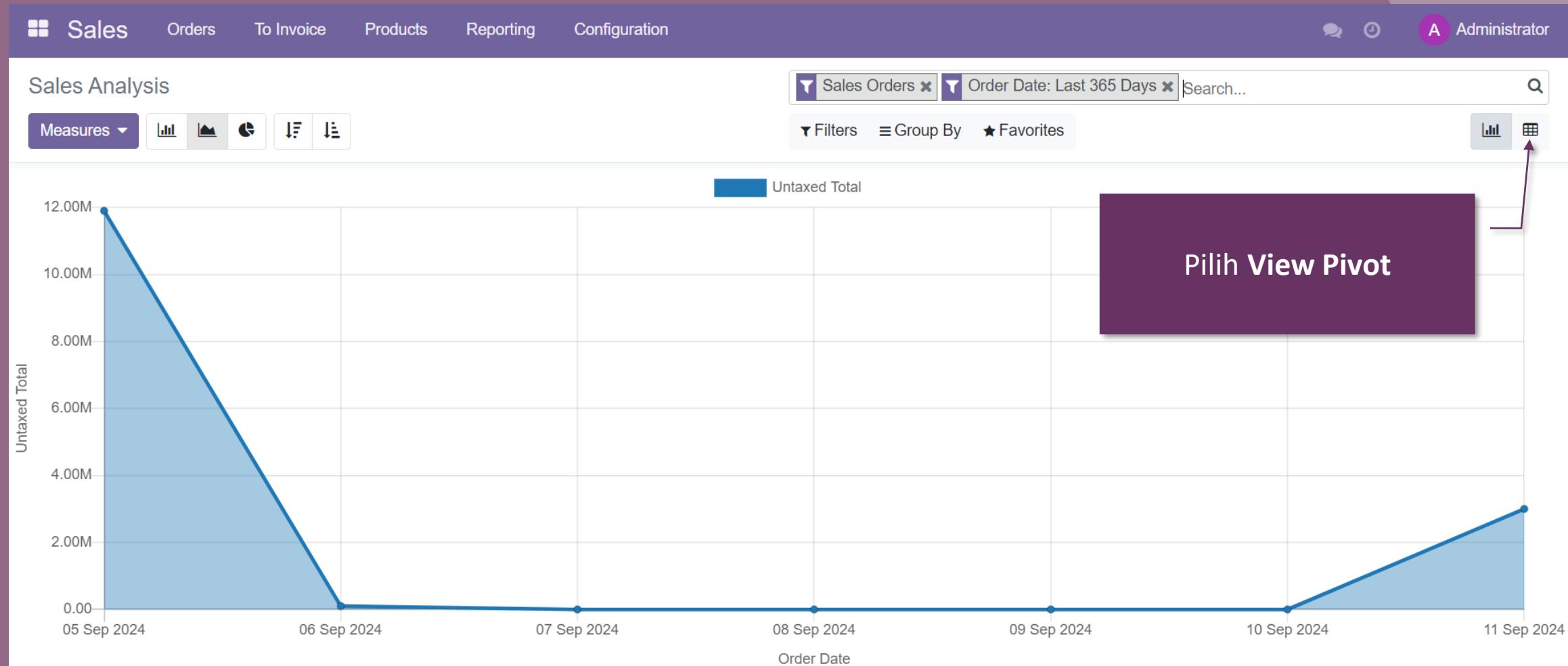
Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations Create  Sales My Quotations Search... 1-6 / 6     

Pilih menu **Reporting** kemudian pilih “**Sales**”

Number	Creation Date	Customer	Next Activity	Total	Status
S00006	09/11/2024	ASTRA DAIHATSU ASIA AFRIKA	A Administrator	Rp 3,330,000.00	Sales Order
S00005	09/06/2024	AITI	A Administrator	Rp 111,000.00	Sales Order
S00004	09/05/2024	AITI	A Administrator	Rp 1,500,000.00	Quotation
S00003	09/05/2024	AITI	A Administrator	Rp 4,329,000.00	Quotation
S00002	09/05/2024	AITI	A Administrator	Rp 6,660,000.00	Sales Order
S00001	09/05/2024	AITI	A Administrator	Rp 6,560,000.00	Sales Order
22,490,000.00					

Melihat Laporan Penjualan



Melihat Laporan Penjualan

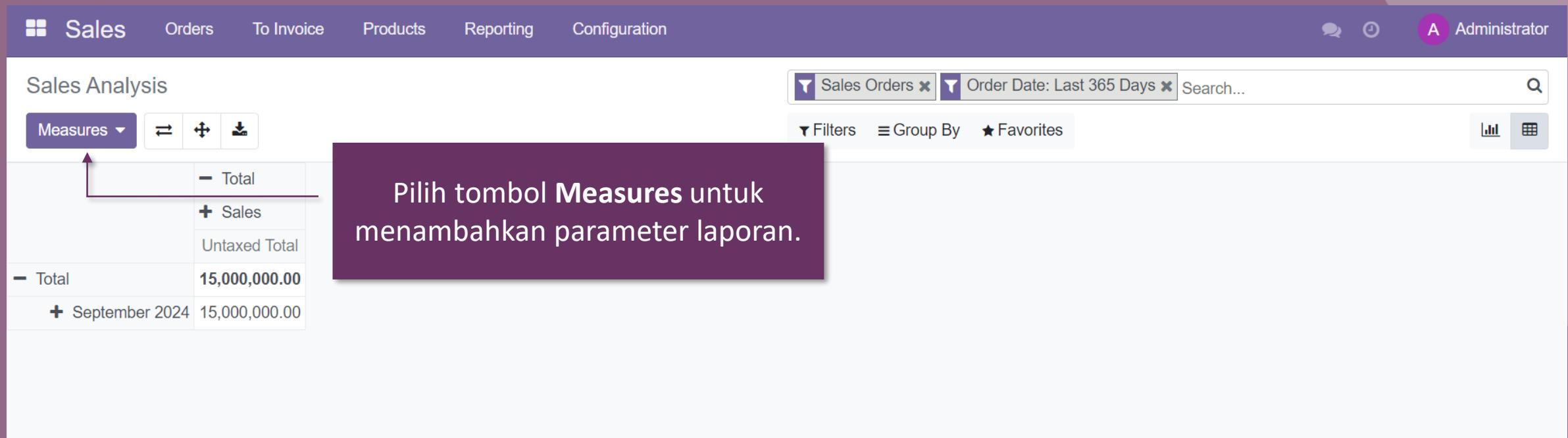
Sales Orders Order Date: Last 365 Days Search... Filters Group By Favorites

Measures ▾

Total Sales Untaxed Total

	Total
- Total	15,000,000.00
+ September 2024	15,000,000.00

Pilih tombol **Measures** untuk menambahkan parameter laporan.



Melihat Laporan Penjualan

Sales Orders Order Date: Last 365 Days Search... Filters Group By Favorites

Measures # of Lines Discount % Discount Amount Gross Weight Qty Delivered Qty Invoiced Qty Ordered Total

Total	Count	Qty Delivered	Qty Invoiced	Qty Ordered
16,661,000.00	5	13.00	3.00	15.00
16,661,000.00	5	13.00	3.00	15.00

Pilih parameter yang akan digunakan untuk melihat report penjualan, contoh:

1. Qty Ordered
2. Qty Received
3. Untaxed Total
4. Total

Melihat Laporan Penjualan

Sales Analysis

Measures ▾   

 Total
 Sales

	Untaxed Total	Total	Qty Delivered	Qty Invoiced	Qty Ordered
- Total	15,000,000.00	16,661,000.00	13.00	3.00	15.00
+ September 2024	15,000,000.00	16,661,000.00	13.00	3.00	15.00

 Pilih icon “+” untuk memunculkan parameter laporan lainnya.

 Sales Orders   Order Date: Last 365 Days  Search... 

 Filters  Group By  Favorites  

Melihat Laporan Penjualan

Sales Orders To Invoice Products Reporting Configuration

Sales Analysis

Measures ▾   

Sales Orders Order Date: Last 365 Days Search... Filters Group By Favorites

+ Total
Untaxed Total Total Qty Delivered Qty Invoiced Qty Ordered

+ Total	15,000,000.00	16,661,000.00	13.00	3.00	15.00
---------	---------------	---------------	-------	------	-------

Salesperson
Sales Team
Customer ←
Customer Country
Customer Industry
Product
Product Category
Status

Order Date ▶
Add Custom Group ▶

Pilih parameter **Customer** untuk memunculkan data penjualan berdasarkan **Customer**

Melihat Laporan Penjualan

Sales Orders To Invoice Products Reporting Configuration Administrator

Sales Analysis Sales Orders Order Date: Last 365 Days Search... Filters Group By Favorites Bar Chart Grid

Measures Swap Add Download

	+ Total				
	Untaxed Total	Total	Qty Delivered	Qty Invoiced	Qty Ordered
- Total	15,000,000.00	16,661,000.00	13.00	3.00	15.00
+ ATI	12,000,000.00	13,331,000.00	10.00	0.00	12.00
+ ASTRA DAIHATSU ASIA AFRIKA	3,000,000.00	3,330,000.00	3.00	3.00	3.00

Pilih icon “+” untuk memunculkan parameter laporan lainnya

Melihat Laporan Penjualan

Sales Orders Order Date: Last 365 Days Search... Filters Group By Favorites

	+ Total				
	Untaxed Total	Total	Qty Delivered	Qty Invoiced	Qty Ordered
- Total	15,000,000.00	16,661,000.00	13.00	3.00	15.00
+ AITI	12,000,000.00	13,331,000.00	10.00	0.00	12.00
+ ASTRA	3,000,000.00	3,330,000.00	3.00	3.00	3.00

Measures ▾   

Product

Pilih parameter **Product** untuk memunculkan data pembelian berdasarkan **Product**

Salesperson
Sales Team
Customer
Customer Country
Customer Industry
Product
Product Category
Status
Order Date
Add Custom Group

Melihat Laporan Penjualan

Sales Orders To Invoice Products Reporting Configuration

Sales Analysis

Measures ▾   

Sales Orders Order Date: Last 365 Days Search... 

Filters Group By Favorites  

	Total	Untaxed Total	Total	Oty Delivered	Oty Invoiced	Oty Ordered
- Total	+ [DISC] Discount	15,000,000.00	16,661,			
- AITI	+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001	12,000,000.00	13,331,			
		-100,000.00	-100,			
- ASTRA DAIHATSU ASIA AFRIKA	+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001	12,100,000.00	13,431,			
		3,000,000.00	3,330,000.00	3.00	3.00	3.00
		3,000,000.00	3,330,000.00	3.00	3.00	3.00

Pilih icon “+” untuk memunculkan parameter laporan lainnya

Melihat Laporan Penjualan

Sales Orders To Invoice Products Reporting Configuration Administrator

Sales Analysis

Measures ▾   

 Filters Group By Favorites  

Total

	Qty Delivered	Qty Invoiced	Qty Ordered
Salesperson	0.00	13.00	3.00
Sales Team	0.00	10.00	15.00
Customer	0.00	0.00	12.00
Customer Country	0.00	0.00	1.00
Customer Industry	0.00	10.00	0.00
Product	0.00	3.00	3.00
Product Category	0.00	3.00	3.00
Status			

Order Date ▾ Year
Quarter
Month ←
Week
Day

Pilih parameter “+”> Order Date > Month
untuk memunculkan data penjualan per bulan

Melihat Laporan Penjualan

Sales Orders To Invoice Products Reporting Configuration Administrator

Sales Analysis Search...

Measures Filters Group By Favorites

— Total
— AITI
— ASTRA DAIHATSU ASIA AFRIKA

+ [DISC] Discount
+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001

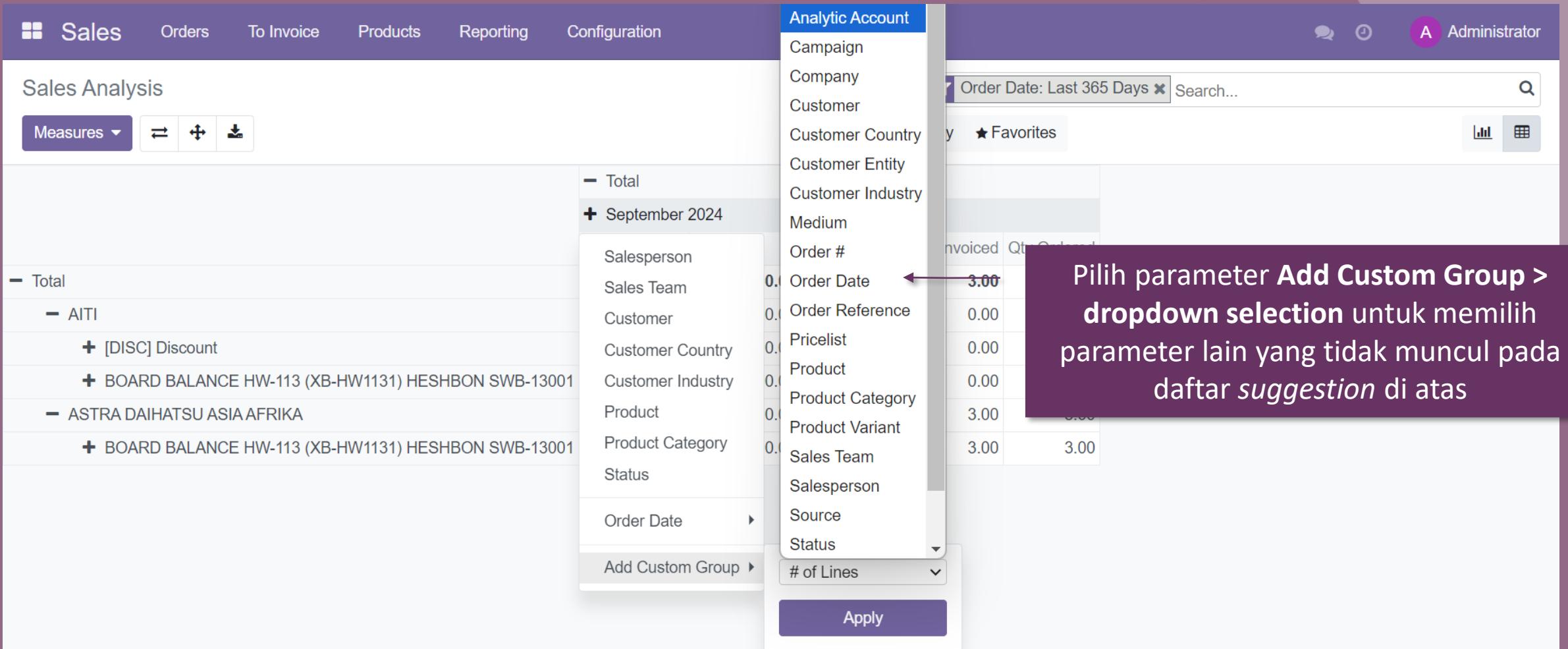
+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001

— Total
— September 2024

	Untaxed Total	Total	Oty Delivered	Oty Invoiced	Oty Ordered
15,000,000.00	16,661,660.00				
12,000,000.00	13,331,660.00				
-100,000.00	-100,000.00				
12,100,000.00	13,431,660.00				
3,000,000.00	3,330,000.00	3.00	3.00	3.00	
3,000,000.00	3,330,000.00	3.00	3.00	3.00	

Pilih icon + untuk memunculkan parameter laporan lainnya.

Melihat Laporan Penjualan



The screenshot shows the Odoo Sales Analysis interface. A context menu is open over a table row for an order dated September 2024. The menu includes options like Total, September 2024, Salesperson, Sales Team, Customer, etc., followed by a separator, then Order Date, Order Reference, Pricelist, Product, etc. At the bottom of the menu are 'Add Custom Group' and '# of Lines' dropdowns, with an 'Apply' button.

Pilih parameter Add Custom Group > dropdown selection untuk memilih parameter lain yang tidak muncul pada daftar suggestion di atas

Melihat Laporan Penjualan

Sales Orders Order Date: Last 365 Days Search... Administrator

Measures ▾ ↔ ✚ ⬇

Filters Group By Favorites

Sales Analysis

	Untaxed Total	Total	Qty Delivered	Qty Invoiced	Qty Ordered
- Total	15,000,000.00	16,661,000.00	13.00	3.00	15.00
- AITI	12,000,000.00	13,331,000.00	10.00	0.00	12.00
+ [DISC] Discount	-100,000.00	-100,000.00	0.00	0.00	1.00
+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001	12,100,000.00	13,431,000.00	10.00	0.00	11.00
- ASTRA DAIHATSU ASIA AFRIKA	3,000,000.00	3,330,000.00	3.00	3.00	3.00
+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001	3,000,000.00	3,330,000.00	3.00	3.00	3.00

Setelah semua parameter dipilih, detail laporan penjualan tampil pada **View Pivot** dashboard **Sales Analysis**.

Menyimpan Filter Pivot Laporan Penjualan

Menyimpan Filter Pivot Laporan Penjualan

Sales Orders Order Date: Last 365 Days Search... (1)

Filters Group By Favorites

Save current search ★ Favorites

Use by default
 Share with all users

Save

Untuk menyimpan filter parameter laporan penjualan, pilih tombol “Favorites”, lalu pilih “Save current search”

	Untaxed Total	Total
00	15,175,000.00	16,855,250.00
00	6,000,000.00	6,671,000.00
00	6,100,000.00	6,771,000.00
1.00	1.00	1,110,000.00
1.00	1.00	1,110,000.00
0.00	2.00	225,000.00
0.00	1.00	125,000.00
0.00	1.00	100,000.00
6.00	6.00	7,950,000.00
5.00	5.00	7,700,000.00
1.00	1.00	250,000.00

Menyimpan Filter Pivot Laporan Penjualan

Sales Orders × Order Date: Last 365 Days × Search...

Filters Group By Favorites

Sesuaikan nama laporan

12.00 9.00 19.00 15,175,000.00 16,855,250.00

Total
12,000,000.00
9,000,000.00
19,000,000.00
15,175,000.00
16,855,250.00
13,671,000.00
10,000,000.00
7,771,000.00
1,110,000.00
1,110,000.00
249,750.00
138,750.00
111,000.00
8,824,500.00
8,547,000.00
277,500.00

Checklist “Use by default” agar parameter laporan tersebut selalu ditampilkan pada dashboard Reporting

Checklist “Share with all users” agar laporan tersebut dapat digunakan juga oleh user lain

Save current search → **Laporan Penjualan Per Bulan**
 Use by default
 Share with all users
Save

Measures ▾ = + Download

Total
- ALTI
+ [DISC] Discount
+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-
- ASTRA DAIHATSU ABC SERPONG
+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-
- ASTRA DAIHATSU ADI SUCIPTO
+ AC CARE
+ SPOORING BALANCING
- ASTRA DAIHATSU ASIA AFRIKA
+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-
+ Ban Mobil

Menyimpan Filter Pivot Laporan Penjualan

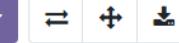
Sales Orders | Order Date: Last 365 Days | Search... | Filters | Group By | Favorites

Pilih tombol Save

	Total	September 2024	Qty Delivered	12.00	5.00	0.00	0.00	1.00	-100,000.00	-100,000.00
- Total										
- AITI										
+ [DISC] Discount				0.00	0.00	0.00	0.00	1.00	1,000,000.00	1,000,000.00
+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001				5.00	0.00	6.00	6,100,000.00	6.00	6,771,000.00	
- ASTRA DAIHATSU ABC SERPONG				1.00	1.00	1.00	1,000,000.00	1.00	1,110,000.00	
+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001				1.00	1.00	1.00	1,000,000.00	1.00	1,110,000.00	
- ASTRA DAIHATSU ADI SUCIPTO				0.00	2.00	2.00	225,000.00	2.00	249,750.00	
+ AC CARE				0.00	1.00	1.00	125,000.00	1.00	138,750.00	
+ SPOORING BALANCING				0.00	1.00	1.00	100,000.00	1.00	111,000.00	
- ASTRA DAIHATSU ASIA AFRIKA				6.00	6.00	9.00	7,950,000.00	9.00	8,824,500.00	
+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001				5.00	5.00	8.00	7,700,000.00	8.00	8,547,000.00	
+ Ban Mobil				1.00	1.00	1.00	250,000.00	1.00	277,500.00	

Menyimpan Filter Pivot Laporan Penjualan

Sales Analysis

Measures ▾ 

Filter Laporan Penjualan Bulanan tersimpan pada menu Favorites

	Entered	Untaxed Total	Total
- Total	12.00	9.00	19.00 15,175,000.00 16,855,250.00
- AITI	5.00	0.00	7.00 6,000,000.00 6,671,000.00
+ [DISC] Discount	0.00	0.00	1.00 -100,000.00 -100,000.00
+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001	5.00	0.00	6.00 6,100,000.00 6,771,000.00
- ASTRA DAIHATSU ABC SERPONG	1.00	1.00	1.00 1,000,000.00 1,110,000.00
+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001	1.00	1.00	1.00 1,000,000.00 1,110,000.00
- ASTRA DAIHATSU ADI SUCIPTO	0.00	2.00	2.00 225,000.00 249,750.00
+ AC CARE	0.00	1.00	1.00 125,000.00 138,750.00
+ SPOORING BALANCING	0.00	1.00	1.00 100,000.00 111,000.00
- ASTRA DAIHATSU ASIA AFRIKA	6.00	6.00	9.00 7,950,000.00 8,824,500.00
+ BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001	5.00	5.00	8.00 7,700,000.00 8,547,000.00
+ Ban Mobil	1.00	1.00	1.00 250,000.00 277,500.00

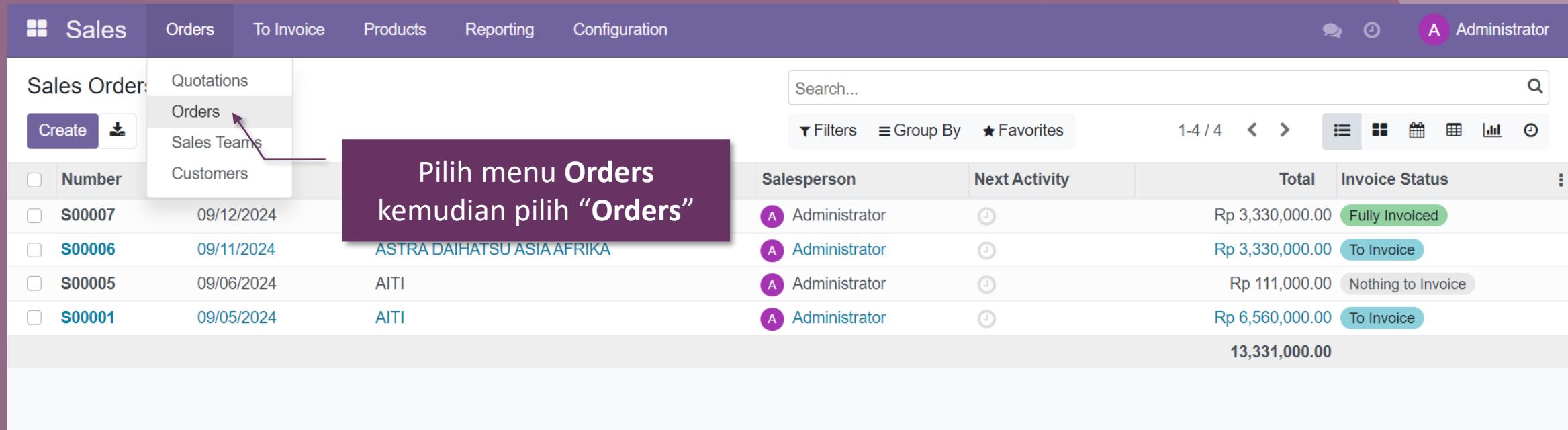
Filters Group By Favorites

Laporan Penjualan Per Bulan

Save current search

Revisi Sales Order

Revisi Sales Order



A screenshot of the Odoo Sales Orders dashboard. The top navigation bar shows 'Sales' as the active module, followed by 'Orders', 'To Invoice', 'Products', 'Reporting', and 'Configuration'. On the far right, there are user icons for 'Administrator' and other users. Below the navigation is a search bar and various filtering options. The main area displays a list of sales orders with columns for 'Number', 'Date', 'Customer', 'Salesperson', 'Next Activity', 'Total', and 'Invoice Status'. A context menu is open over the first order, with 'Quotations' at the top, followed by 'Orders' (which is highlighted with a purple arrow), 'Sales Teams', and 'Customers' at the bottom.

Pilih menu **Orders** kemudian pilih “**Orders**”

Salesperson	Next Activity	Total	Invoice Status
A Administrator	(J)	Rp 3,330,000.00	Fully Invoiced
A Administrator	(J)	Rp 3,330,000.00	To Invoice
A Administrator	(J)	Rp 111,000.00	Nothing to Invoice
A Administrator	(J)	Rp 6,560,000.00	To Invoice
13,331,000.00			

Alur ini terjadi apabila terdapat revisi **Sales Order** terkait **Product** maupun **Quantity**

Revisi Sales Order

Sales Orders / S00007

Edit Create Print Action 1 / 4 < >

Send by Email Cancel ← Pilih tombol “Cancel” pada transaksi sales yang akan di revisi

Quotation Quotation Sent Sales Order

S00007

Customer: ASTRA DAIHATSU ASIA AFRIKA
Jl. Asia Afrika No.125, Kb. Pisang
Sumur Bandung
Bandung JB 40112
Indonesia

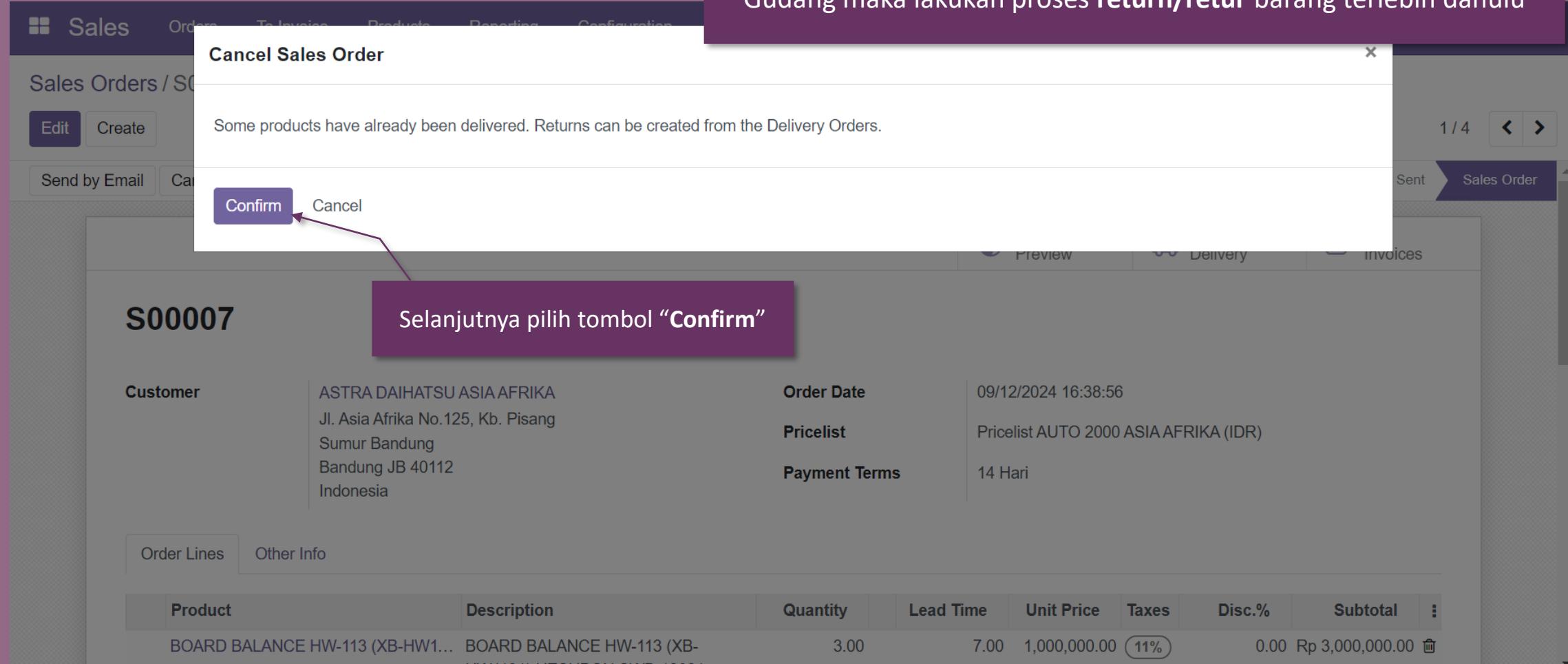
Order Date: 09/12/2024 16:38:56
Pricelist: Pricelist AUTO 2000 ASIA AFRIKA (IDR)
Payment Terms: 14 Hari

Order Lines Other Info

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮
BOARD BALANCE HW-113 (XB-HW1...	BOARD BALANCE HW-113 (XB-HW1131) HFSHRON SWR-13001	3.00	7.00	1,000,000.00	(11%)	0.00	Rp 3,000,000.00	

Revisi Sales Order

Setelah memilih tombol “Cancel” akan memunculkan pop up untuk “Confirm” Cancel Sales Order, apabila sudah ada proses delivery order atau pengeluaran barang dari Gudang maka lakukan proses return/retur barang terlebih dahulu



The screenshot shows the Odoo Sales Orders interface. A modal window titled "Cancel Sales Order" is displayed. Inside the modal, there is a message: "Some products have already been delivered. Returns can be created from the Delivery Orders." Below the message are two buttons: "Confirm" (highlighted with a purple arrow) and "Cancel". The main sales order details are visible in the background, including the order number S00007, customer information (ASTRA DAIHATSU ASIA AFRIKA), and order date (09/12/2024 16:38:56). The modal also contains a callout text: "Selanjutnya pilih tombol ‘Confirm’".

Sales Orders / SO

Edit Create

Send by Email

Cancel

1 / 4

Sent Sales Order

Invoices

S00007

Customer: ASTRA DAIHATSU ASIA AFRIKA
Jl. Asia Afrika No.125, Kb. Pisang
Sumur Bandung
Bandung JB 40112
Indonesia

Order Date: 09/12/2024 16:38:56

Pricelist: Pricelist AUTO 2000 ASIA AFRIKA (IDR)

Payment Terms: 14 Hari

Order Lines Other Info

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮
BOARD BALANCE HW-113 (XB-HW1...	BOARD BALANCE HW-113 (XB-	3.00	7.00	1,000,000.00	(11%)	0.00	Rp 3,000,000.00	

Revisi Sales Order

Sales Orders / S00007

Edit Create Print Action

Status transaksi berubah menjadi “Cancelled”

Set to Quotation ← Kemudian pilih tombol “Set to Quotation”

Quotation → Quotation Sent → Sales Order → Cancelled

Customer Preview 1 Delivery 1 Invoices

S00007

Customer	ASTRA DAIHATSU ASIA AFRIKA Jl. Asia Afrika No.125, Kb. Pisang Sumur Bandung Bandung JB 40112 Indonesia	Expiration	
		Order Date	09/12/2024 16:38:56
		Pricelist	Pricelist AUTO 2000 ASIA AFRIKA (IDR)
		Payment Terms	14 Hari

Revisi Sales Order

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / S00007

Save Discard 1 / 7 < >

Send by Email Confirm Cancel Quotation Quotation Sent Sales Order

S00007

Customer ASTRA DAIHATSU ASIA AFRIKA Jl. Asia Afrika No.125, Kb. Pisang Sumur Bandung Bandung JB 40112 Indonesia Expiration Pricelist Payment Terms

Pricelist AUTO 2000 ASIA AFRIKA (IDR) 14 Hari

Order Lines Optional Products Other Info

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal
BOARD BALANCE HW-113 (XB-HW1131)	BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001	3.00	7.00	1,000,000.00	(11%)	0.00	Rp 3,000,000.00

Add a product Add a section Add a note

Sesuaikan **Product** dan **Quantity** sesuai kebutuhan

Revisi Sales Order

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / S00007

Save Discard 1 / 7 < >

Send by Email Confirm Cancel Quotation Quotation Sent Sales Order

Customer Preview 1 Delivery 1 Invoices

S00007

Customer ASTRA DAIHATSU ASIA AFRIKA
Jl. Asia Afrika No.125, Kb. Pisang
Sumur Bandung
Bandung JB 40112
Indonesia

Expiration Pricelist Payment Terms

Pricelist AUTO 2000 ASIA AFRIKA (IDR)
14 Hari

Order Lines Optional Products Other Info

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal
BOARD BALANCE HW-113 (XB-HW1... Ban Mobil	BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001 Ban Mobil	5.00 1.00	7.00 7.00	1,000,000.00 250,000.00	(11%) (11%)	0.00 0.00	Rp 5,000,000.00 Rp 250,000.00

Add a product Add a section Add a note

Terms and conditions...

Product dan Quantity sudah disesuaikan

Untaxed Amount: Rp 5,250,000.00
Taxes: Rp 577,500.00
Total: Rp 5,827,500.00

Revisi Sales Order

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / S00007

Edit Create Print Action 1 / 7 < >

Send by Email Confirm Cancel Quotation Quotation Sent Sales Order

Kemudian klik tombol “Confirm”, “Confirm Delivery Order” dan “Create Invoice” transaksi, lakukan langkah yang sama seperti saat membuat Quotation

Customer	ASTRA DAIHATSU ASIA AFRIKA Jl. Asia Afrika No.125, Kb. Pisang Sumur Bandung Bandung JB 40112 Indonesia	Expiration																												
		Pricelist	Pricelist AUTO 2000 ASIA AFRIKA (IDR)																											
		Payment Terms	14 Hari																											
Order Lines Optional Products Other Info <table border="1"> <thead> <tr> <th>Product</th> <th>Description</th> <th>Quantity</th> <th>Lead Time</th> <th>Unit Price</th> <th>Taxes</th> <th>Disc.%</th> <th>Subtotal</th> <th>⋮</th> </tr> </thead> <tbody> <tr> <td>BOARD BALANCE HW-113 (XB-HW1...)</td> <td>BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001</td> <td>5.00 ↕</td> <td>7.00</td> <td>1,000,000.00 (11%)</td> <td>0.00</td> <td>Rp 5,000,000.00 ⏎</td> <td></td> <td></td> </tr> <tr> <td>Ban Mobil</td> <td>Ban Mobil</td> <td>1.00 ↕</td> <td>7.00</td> <td>250,000.00 (11%)</td> <td>0.00</td> <td>Rp 250,000.00 ⏎</td> <td></td> <td></td> </tr> </tbody> </table> Add a product Add a section Add a note				Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮	BOARD BALANCE HW-113 (XB-HW1...)	BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001	5.00 ↕	7.00	1,000,000.00 (11%)	0.00	Rp 5,000,000.00 ⏎			Ban Mobil	Ban Mobil	1.00 ↕	7.00	250,000.00 (11%)	0.00	Rp 250,000.00 ⏎		
Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮																						
BOARD BALANCE HW-113 (XB-HW1...)	BOARD BALANCE HW-113 (XB-HW1131) HESHBON SWB-13001	5.00 ↕	7.00	1,000,000.00 (11%)	0.00	Rp 5,000,000.00 ⏎																								
Ban Mobil	Ban Mobil	1.00 ↕	7.00	250,000.00 (11%)	0.00	Rp 250,000.00 ⏎																								

Revisi Sales Order

Sales Orders To Invoice Products Reporting Configuration A Administrator

Quotations / S00007

Edit Create Print Action 1 / 7 < >

Send by Email Cancel Quotation Quotation Sent Sales Order

S00007

Customer	Astra Daihatsu Asia Afrika Jl. Asia Afrika No.125, Kb. Pisang Sumur Bandung Bandung JB 40112 Indonesia	Order Date	09/13/2024 09:53:54
		Pricelist	Pricelist AUTO 2000 ASIA AFRIKA (IDR)
		Payment Terms	14 Hari

Order Lines Other Info

Product	Description	Quantity	Lead Time	Unit Price	Taxes	Disc.%	Subtotal	⋮
BOARD BALANCE HW-113 (XB-HW113)	BOARD BALANCE HW-113 (XB-HW113) HESHBON SWB-13001	5.00	7.00	1,000,000.00	(11%)	0.00	Rp 5,000,000.00	⋮
Ban Mobil	Ban Mobil	1.00	7.00	250,000.00	(11%)	0.00	Rp 250,000.00	⋮

Add a product Add a section Add a note

Revisi sales order telah selesai dilakukan