

CRM — Leads, Deals & Pipeline

Mengelola prospek & peluang penjualan ISP (B2B). Akses: <https://crm.dev.inti.net.id/>.

“ Data contoh: organisasi seperti **PT Permata Logistik, Universitas Teknologi Mandiri**; leads & deals layanan dedicated/business.

1. Konsep CRM Frappe

Alur: **Lead** (kontak awal) → dikualifikasi → **Deal** (peluang dengan nilai) → menang/kalah. Didukung **Organization, Contact, Task, dan Call Log**.

CRM Administrator

Pemberitahuan

Dasbor

Leads

Deals

Kontak

Organizations

Catatan

Tugas

Call Logs

Permissions update

You are all set

Clear Demo Data

Jatuh

Leads / List

Nama Lengkap

Surel

Organisasi

Status

Sumber

	Nama	Organisasi	Status	Surel	Mobile No.
☐	S Sinta Dewi		Contacted	sinta@startupmuda.exa...	0813222200
☐	R Reza Pratama	Apartemen Green P...	Nurture	reza@greenpark.example	0813222200
☐	P Putri Anggraini	PT Logistik Andalan	Baru	putri@logistikandalan.ex...	0813222200
☐	G Gilang Ramadhan	Yayasan Pendidikan...	Qualified	gilang@yph.example	0813222200
☐	V Vina Oktavia	PT Pabrik Tekstil Se...	Contacted	vina@tekstilsentosa.exa...	0813222200
☐	H Hasan Basri	PT Ritel Modern Jaya	Nurture	hasan@ritelmodern.exa...	0813222200
☐	L Lukman Hakim		Qualified	lukman@umkmdigital.ex...	081311110010
☐	I Irfan Hidayat		Baru	irfan.h@startupkita.exam...	081311110000
☐	M Mega Puspita	Koperasi Sejahtera ...	Contacted	mega@koperasisejahter...	081311110000
☐	D Doni Saputra	PT Agro Nusantara	Baru	doni@agronusantara.exa...	081311110000
☐	T Tari Wulandari	Hotel Bintang Lima	Qualified	tari@hotelbintang5.exam...	081311110000
☐	Y Yusuf Maulana	PT Garmen Sentosa	Contacted	yusuf@garmensentosa.e...	081311110000
☐	S Sari Indah	RS Harapan Medika	Baru	sari.indah@harapanmedi...	081311110000
☐	B Bambang Iriawan	Universitas Teknolo...	Qualified	bambang@utm.example	081311110000
☐	N Nina Kartika	PT Surya Konstruksi	Contacted	nina.k@suryakon.example	081311110000
☐	W Wawan Setiawan	PT Permata Logistik	Baru	wawan.s@permatalog.ex...	081311110000
☐	C Carol Smith	BrightPath Ltd	Nurture	carol.smith@example.com	+1 555 000 5
☐	B Bob Martinez	Globex Industries	Contacted	bob.martinez@example....	+1 555 000 5

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Getting started

Welcome to Frappe CRM

9/9 steps completed

100% completed

Setup your password

Create your first lead

Invite your team

Convert lead to deal

Create your first task

Create your first note

Add your first comment

Send email

Change deal status

Help centre

2. Membuat Lead

- 1. Menu **Leads** → **+ Create**.
- 2. Isi **Nama depan/belakang, Email, No. HP, Organization**, dan **Status** (mis. *New, Contacted, Qualified*).
- 3. **Save**. Buka lead untuk menambah catatan, tugas, dan log aktivitas.

Frappe CRM CRM

PencarianCtrl+K

Pemberitahuan

Rumah

Communication Statuses

Leads

SLA

Lead Statuses

Territories

Aturan Penugasan

Deals

Deal Statuses

Lead Sources

Organizations

Kontak

Industries

Administratoradmin@example.com

/ Frappe CRM / CRM Lead

List ViewSaved FiltersRefreshMore

+ Tambah CRM Lead

IDNama LengkapSurelOrganisasiStatusFilterXTerakhir Diperbarui Pada

Dikonversi

☐ Nama Lengkap

Status

Dikonversi

ID

20 dari 28

☐ Sinta Dewi

Contacted

CRM-LEAD-2026-00028

3 h0

☐ Reza Pratama

Nurture

CRM-LEAD-2026-00027

3 h0

☐ Putri Anggraini

Baru

CRM-LEAD-2026-00026

3 h0

☐ Gilang Ramadhan

Qualified

CRM-LEAD-2026-00025

3 h0

☐ Vina Oktavia

Contacted

CRM-LEAD-2026-00024

3 h0

☐ Hasan Basri

Nurture

CRM-LEAD-2026-00023

3 h0

☐ Lukman Hakim

Qualified

CRM-LEAD-2026-00022

3 h0

☐ Irfan Hidayat

Baru

CRM-LEAD-2026-00021

3 h0

☐ Mega Puspita

Contacted

CRM-LEAD-2026-00020

3 h0

☐ Doni Saputra

Baru

CRM-LEAD-2026-00019

3 h0

☐ Tari Wulandari

Qualified

CRM-LEAD-2026-00018

3 h0

☐ Yusuf Maulana

Contacted

CRM-LEAD-2026-00017

3 h0

☐ Sari Indah

Baru

CRM-LEAD-2026-00016

3 h0

☐ Bambang Iriawan

Qualified

CRM-LEAD-2026-00015

3 h0

☐ Nina Kartika

Contacted

CRM-LEAD-2026-00014

3 h0

☐ Wawan Setiawan

Baru

CRM-LEAD-2026-00013

3 h0

☐ Carol Smith

Nurture

CRM-LEAD-2026-00003

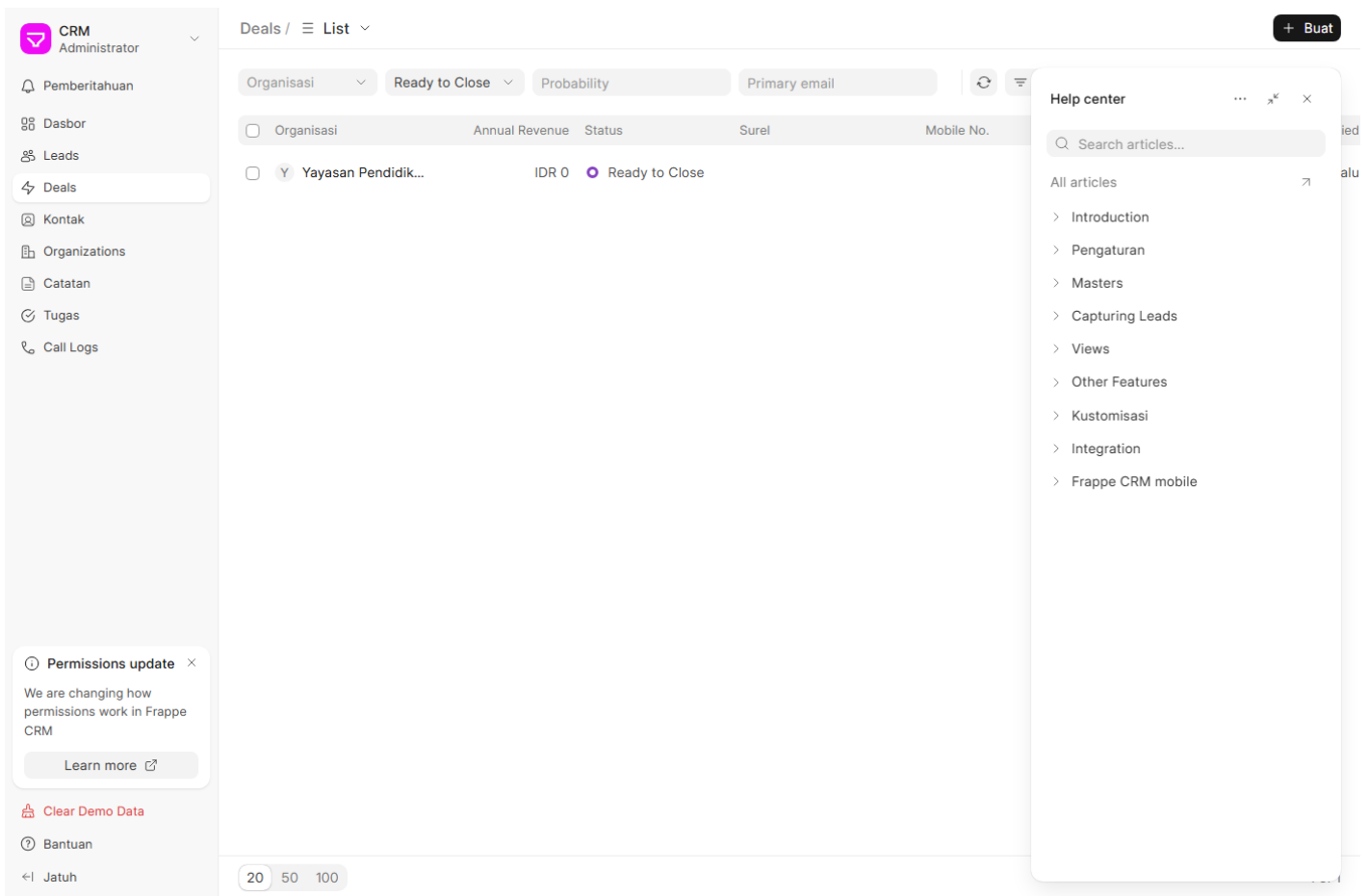
3 h1

201005002500

Muat lebih banyak

3. Mengubah Lead jadi Deal

- 1. Buka Lead yang sudah *Qualified* → klik **Convert to Deal**.
- 2. Lengkapi **Deal**: organisasi, nilai/anggaran, **Status** pipeline (*Qualification* → *Proposal/Quotation* → *Negotiation* → *Won/Lost*), perkiraan tanggal closing.
- 3. **Save**. Gunakan tampilan **Kanban** untuk menggeser deal antar tahap.



4. Organization & Contact

- **Organizations:** data perusahaan calon/pelanggan (industri, website, no. karyawan).
- **Contacts:** orang/PIC; bisa ditautkan ke organization & deal.

F

Frappe CRM CRM

Pencarian

Ctrl+K

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Lead Sources

Organizations

Kontak

Industries

Administrator

admin@example.com

/

Frappe CRM

/

CRM Organization

List View

Saved Filters

+

Tambah CRM Organization

ID	Organization	No. of Employ...	Wilayah	Industry	Filter	×	Terakhir Diperbarui Pada
☐ ID							20 dari 20
☐ Apartemen Green Park							3 h 0 0
☐ PT Logistik Andalan							3 h 0 0
☐ Yayasan Pendidikan Harapan							3 h 0 0
☐ PT Pabrik Tekstil Sentosa							3 h 0 0
☐ PT Ritel Modern Jaya							3 h 0 0
☐ Koperasi Sejahtera Bersama							3 h 0 0
☐ PT Agro Nusantara							3 h 0 0
☐ Hotel Bintang Lima							3 h 0 0
☐ PT Garmen Sentosa							3 h 0 0
☐ RS Harapan Medika							3 h 0 0
☐ Universitas Teknologi Mandiri							3 h 0 0
☐ PT Surya Konstruksi							3 h 0 0
☐ PT Permata Logistik							3 h 0 0
☐ Forge Digital							1 w 0 0
☐ Vertex Analytics							1 w 0 0
☐ ScaleUp Labs							2 w 0 0
☐ PivotTech Solutions							3 w 0 0
☐ Meridian Systems							3 w 0 0

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Muat lebih banyak

5. Aktivitas: Task & Call Log

- **Tasks:** to-do sales (mis. *Follow up penawaran, Survey lokasi*) dengan tenggat & status.
- **Call Logs:** catat panggilan masuk/keluar (durasi, hasil) — otomatis terisi bila modul telephony tersambung.

Frappe CRM CRM

PencarianCtrl+K

Pemberitahuan

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Lead Sources

Organizations

Kontak

Industries

AAdministratoradmin@example.com

/ Frappe CRM / CRM Deal

List View

Saved Filters

+ Tambah CRM Deal

IDOrganisasiStatusPrimary email

Filter

Terakhir Diperbarui Pada

ID	Organisasi	Status	ID	18 dari 18
☐	Apartemen Green Park	Won	CRM-DEAL-2026-00018	3 h 0 0
☐	PT Logistik Andalan	Negotiation	CRM-DEAL-2026-00017	3 h 0 0
☐	Yayasan Pendidikan Harapan	Ready to Close	CRM-DEAL-2026-00016	3 h 0 0
☐	PT Pabrik Tekstil Sentosa	Demo/Making	CRM-DEAL-2026-00015	3 h 0 0
☐	PT Ritel Modern Jaya	Proposal/Quotation	CRM-DEAL-2026-00014	3 h 0 0
☐	PT Agro Nusantara	Won	CRM-DEAL-2026-00013	3 h 0 0
☐	Hotel Bintang Lima	Negotiation	CRM-DEAL-2026-00012	3 h 0 0
☐	RS Harapan Medika	Kualifikasi	CRM-DEAL-2026-00011	3 h 0 0
☐	Universitas Teknologi Mandiri	Won	CRM-DEAL-2026-00010	3 h 0 0
☐	PT Surya Konstruksi	Negotiation	CRM-DEAL-2026-00009	3 h 0 0
☐	PT Permata Logistik	Kualifikasi	CRM-DEAL-2026-00008	3 h 0 0
☐	Forge Digital	Kalah	CRM-DEAL-2026-00007	3 h 1 0
☐	Vertex Analytics	Kalah	CRM-DEAL-2026-00006	3 h 1 0
☐	Meridian Systems	Won	CRM-DEAL-2026-00005	3 h 1 0
☐	ScaleUp Labs	Kualifikasi	CRM-DEAL-2026-00004	3 h 1 0
☐	PivotTech Solutions	Negotiation	CRM-DEAL-2026-00003	3 h 1 0
☐	Acme Corp	Demo/Making	CRM-DEAL-2026-00001	3 h 2 0

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6. Tips

- CRM dan ERPNext berada di site yang sama; deal yang menang bisa ditindaklanjuti jadi Quotation/Sales Order di ERPNext.
- Atur kolom & filter pada list untuk memantau pipeline per status/owner.

Revision #1
Created 2026-06-07 09:11:46 UTC by Guest
Updated 2026-06-10 01:14:11 UTC by Guest