XERPIUM

Sales & CRM

Enterprise Resource Planning

Solusi ERP lengkap untuk industri sales & crm

2000+
MODUL

AI
ASSISTANT

SaaS
/ ON PREMISE

Bahasa Indonesia Edition — brosur.xerpium.com

Ekosistem Manajemen Penjualan

XERPIUM SALES adalah solusi sales & CRM terlengkap — dari quotation, SO, automatic workflow, tier validation, product recommendation, blanket order, invoice plan, loyalty program, komisi sales, dynamic stage, hingga reporting.

Quotation & Sale Order

Order Type — Typology with custom sequence, journal, warehouse, payment terms, pricelist, incoterm, route, team

Revision — Full revision tracking: cancel old + create new draft, unique constraint

Archive — Archive locked/done orders, prevent archiving draft/sent

Cancel Reason — Reason codes, optional email on cancel

Auto Cancel — Cron-job auto-cancel expired quotations by validity period

Validity — Automatic validity days, expire quotes after period

Automatic Workflow

Workflow Process — Configurable automation: validate order, send email, create invoice, validate invoice, register payment, mark done

Domain Filter — Per-step domain filter, team override, journal override

Force Invoiced — Option to auto-force invoiced status

Periodicity — Time-interval scheduling for workflow execution

Stock Integration — Auto create & validate stock picking

Queue Jobs — Execute auto-workflow async via queue jobs

Tier Validation & Exception

Tier Validation — Multi-level approval: Supervisor → Manager → Director

Notifications — Requested, accepted, rejected subtypes per tier

Exception Rules — Configurable rules blocking confirmation on match

Popup Warning — Popup on draft confirm for warnings

Credit Check — Warning when over credit limit on partner change

Discount Check — Validasi diskon sesuai scheme

Invoicing & Payment

Advance Payment — Down payment tracking, residual balance, payment lines

Invoice Plan — Invoice scheduling & planning per terms

Force Invoiced — Force invoice status per line & qty

Invoice Blocking — Block invoicing on certain conditions

Invoice Frequency — Recurring invoice frequency

Split Payment — Split payments on invoices

Payment Sheet — Create payments without full accounting

Pricing & Discounts

Global Discount — Diskon % di level order

Fixed Discount — Diskon nominal tetap

Discount Display — Tampilkan diskon sebagai amount vs %

Custom Rounding — Custom rounding rules per SO

Pricelist Surcharge — Show surcharges to customers

Commitment Date — Use commitment date for pricelist pricing

Packaging — Pricelist rules by packaging

Currency Rate — Show exchange rate on SO PDF

Product Recommendation

History-based — Rekomendasi dari riwayat SO (by delivery address)

Lookback — Configurable lookback months, # recommendations

Sort Options — Sort by times delivered, units, category, code, name

Price Source — Pricelist or last sale price

Custom Domain — Custom domain filter for recommendations

Stock Info — QoH info in recommendation wizard

Product Set — Pre-configured bundles for SO, reusable

Multi Add — Multi-product add wizard

Loyalty & Promotion

Program Rules — Multi-buy, free items, percentage discounts

Order Info — Applied loyalty info on SO

Line Link — Link loyalty programs to generated lines

Suggestions — Suggest promotions in SO line widget

Multi Gift — Multiple gift rewards per promotion

Partner Filter — Customer filter conditions per promotion

Order Type — Restrict loyalty by order type

Incompatibility — Rules between promotions

Sales Target & Commission

Sales Target — Per salesman/month, by amount/qty/per product

Realization — Auto-computed from confirmed SO

Achievement % — Target vs actual, color-coded

Commission Plans — Target/achievement-based, periodicity

Team Plans — Team & personal commission plans

Rate Interpolation — Achievement rates, commission amount interpolation

P&L Link — Links to vit.report_structure

Delivery Split & Sourcing

Split by Date — Separate deliveries per commitment date

Multi-Address — Per-line delivery address

Cancel Restriction — Prevent cancel if stock moves exist

Picking Block — Block delivery creation, configurable reasons

Picking Note — Notes propagated to deliveries

Line Sequence — Propagate line seq from SO to picking

Customer Ref — Customer ref on SO → stock moves

Return Request — Return request from SO

Requested Delivery — Delivery period on SO & lines

Lot & Serial Selection

Lot Selection — Full lot/serial selection on SO lines

Domain Filter — Filter by available quants

Availability Check — Check serial availability at confirmation

Exclude Reserved — Exclude serials reserved in other draft orders

Lot Pricing — Lot-specific pricing per serial

Lot Generator — Lot generation for SO lines

Per-Line Source — Per-line warehouse source location

Secondary Unit — Secondary unit quantities in stock context

Order Type System

Order Type — Defines: sequence, journal, warehouse, picking policy, payment term, pricelist, incoterm, route, salesperson, team, analytic account

Auto Compute — Auto-computed from partner/company defaults

Renumber — Renumbers SO on type change

Quotation Number — Different sequence for quotes vs orders

Confirm Message — Confirmation wizard per order type

Substate — Sub-states within main SO stages, mail templates

Tags & Security

Tags — Multi-category labels on SO & lines

Priority — Priority field on SO

Sales Team Security — Channel-based security groups, restrict by team

Readonly Security — Read-only fields for certain roles

Dynamic Stage — Configurable stage: Draft → Sent → Confirm → Done → Cancel

Sync — Auto-sync stage dari native state

CRM — Customer Relationship Management

Lead & opportunity management lengkap: pipeline, scoring, email integration, activity planning, forecast, reporting.

Lead & Opportunity

Lead Management — Capture leads from website, email, import

Pipeline Kanban — New → Qualified → Proposition → Won / Lost

Probability — Win probability %, expected revenue, closing date

Lost Reasons — Reason codes, win/lost analysis

Duplicate Detection — Deteksi lead/partner duplikat

Activity & Automation

Activity Planning — Call, email, meeting, todo per opportunity

Email Integration — Incoming/outgoing, template replies

Phone Log — Call logging, notes, follow-up scheduler

Meeting Calendar — Schedule, auto-conflict check

Auto Assign — Lead → salesperson by rules

Email Campaigns — Mass mail, tracking, bounce handling

Pipeline & Forecast

Pipeline View — Visual kanban per stage, drag-and-drop

Revenue Forecast — Forecast berdasarkan pipeline probability

Team Pipeline — Per-sales-team target vs actual

Won/Lost Analysis — Win rate per salesperson/product

Stage Analysis — Time in stage, bottleneck detection

Expected Revenue — Weighted amount × probability

Intelligence

Lead Scoring — Automated scoring by source/behavior

Predictive Scoring — AI prediction of lead conversion

Partner Assignment — Auto-assign by territory/industry

Activity Report — Sales activities effectiveness

Subscription — Convert won opp to recurring

Sales ↔ Accounting

Invoice otomatis dari SO confirm

Advance payment, invoice plan, split payment

Payment sheet tanpa full accounting access

COA penjualan, PPN, revenue recognition

Sales ↔ Inventory

- Delivery split by date, multi-address
- Lot/serial selection on SO lines
- Per-line warehouse sourcing
- Stock availability & reservation

Sales ↔ Purchase

- Auto-cancel PO when SO canceled
- Auto-confirm PO when SO confirmed
- Dropship integration

Sales ↔ Dashboard

- Sales KPI: revenue, orders, avg value
- Top products & customers
- Monthly revenue trend
- AI auto-generate dashboard

Sales ↔ AI Assistant

- Buat quotation via natural language
- Cek status SO & payment
- Generate invoice & reports via chat
- 100+ tools, 11 bahasa

Sales ↔ Dynamic Stage

Draft → Sent → Confirm → Done → Cancel

RBAC per stage, Python hooks

Sync native state, kanban view

Xerpium ERP — xerpium.com
Hubungi kami untuk demo gratis
WhatsApp: +62 818-0918-2752 | **▶ @xerpium_id**
Generated 2026-10-27