Quotation vs Order Summary

Report Introduction

Introduction

This report used to how many orders convert from quotation to order

Business Example

Quotation will be released as per the company standard in an fabrication industry. Marketing team need to track the how many orders convert from quotation to order This report will be helpful to view the mentioned details.

Execution

Criteria

This report used to know how many orders convert from quotation

Selection fields

1.Organisation :Select the organization from where the report needs to populate and display the data.

2.Business partner: System will display the business partner name from the quotation document

3.Business partner group: select the business partner group

4.Date ordered: This field used to document creation date updating purpose

5.Sales Representative :This field represents who we going to Quotation prepare the product.

Output fields

1.Quotation: To show the Quotation order document number

2.Customer:This field represents for who we going to sales the product.

3.Bpartner group :Select the business partner group

4.Quote date:This field user to document creation date updating purpose

5.Sales Rep: This field represents who we going to Quotation prepare the product.

6.Quote Loss: To know about the Quotation whether it is a loss or not

7.Amount : It defines the quotation line amount

8. Amount with tax:This field used to show Quotation amount with tax

9.Delivery Terms : It is used to know the delivery term

10.Document Status : It is used to know the status of the quotation document

11.Sales Order : To show the Sales order document number

12.Sales amount: To show the Line amount with out tax detail

13.User/Contact : It defines the user details who created the record

14.Phone: Contact number of the customer

15.Phone 2: Another Contact number of the customer

16.Email: Email address of the customer