

Quotation vs Order

Summary

- Report Introduction
- Execution

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

Home (110461) Summary Quotation Vs Order Summary ✕

Do you want to start the Process?

Organization

Business Partner

Business Partner Group

Date Ordered

Sales Representative

☐ Run as Job

Home (110461) Summary Quotation Vs Order Summary ✕ Report: Quotation Vs Order ... ✕

Report: Quotation Vs Order Summary - Template

HTML Quotation Vs Order Summary - Template Summary

Parameter: Date Ordered >= 05/11/2020 - 05/11/2020

Organization	BPartner Group	Customer	Quotation	Quote Date	Sales Rep	Quote Loss	Amount	Amount With Tax	Delivery Terms	Document Status	Sales Order	Sales Amount	User/Contact	Phone	2nd Phone	EMail
HQ	Customer	Dinesh Pravatha	10080	05/11/2020	Dinesh Raj	No	80.00	94.4	Immediate	In Progress	50497	80.00	Dinesh			

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