

Quotation vs order

- Report Introduction
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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 Summary Quotation Vs Order x

Do you want to start the Process?

Organization HQ

Business Partner

Business Partner Group

Date Ordered 01/01/2020 01/05/2020

Sales Representative

Run as Job

HTML Quotation VS Order-Template Summary

Order	Business Partner	BPartner Group	Date Ordered	sales_order_id	sales_line	Product	Quantity	UOM	Price	Line Amt	Grand Total
10062_28/01/2020	Fire Force	Customer	28/01/20	50427	10	1000005_Vetro 1 cpu	10	Each	1,000.00	10,000.00	11,800.00
20011_29/01/2020	MAK Controls	Customer	29/01/20								
20008_29/01/2020	MAK Controls	Customer	29/01/20								
10066_05/04/2020	CPU Board pvt ltd	Customer	05/04/20								

Criteria

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

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 for who we going to Quotation prepare the product.

Output fields

1.Order: To show the Quotation order document number

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

3.Bpartner group :Select the business partner group

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

5.Sales line : System will display the Quotation line number (Serial number).

6.Product : Product will be displayed by the system from the quotation selected.

7.Quantity :How many qty prepare against the Quotation

8.Uom: This field used to Product -unit of measurement

9.Price : Product price details show in this field

10.Line amt: To show the Line amount with out tax detail

11.Grand total:This field used to show the product price and tax detail