

User Guide

Quote to Job Conversion Report
V21.1.0200

Copyright © 2021 by Electronics for Imaging, Inc. All Rights Reserved.

EFI PrintStream | V21.1.0200 Quote to Job Conversion Report

This publication is protected by copyright, and all rights are reserved. No part of it may be reproduced or transmitted in any form or by any means for any purpose without express prior written consent from Electronics for Imaging, Inc. Information in this document is subject to change without notice and does not represent a commitment on the part of Electronics for Imaging, Inc.

Patents

This product may be covered by one or more of the following U.S. Patents: 4,716,978, 4,828,056, 4,917,488, 4,941,038, 5,109,241, 5,170,182, 5,212,546, 5,260,878, 5,276,490, 5,278,599, 5,335,040, 5,343,311, 5,398,107, 5,424,754, 5,442,429, 5,459,560, 5,467,446, 5,506,946, 5,517,334, 5,537,516, 5,543,940, 5,553,200, 5,563,689, 5,565,960, 5,583,623, 5,596,416, 5,615,314, 5,619,624, 5,625,712, 5,640,228, 5,666,436, 5,745,657, 5,760,913, 5,799,232, 5,818,645, 5,835,788, 5,859,711, 5,867,179, 5,940,186, 5,959,867, 5,970,174, 5,982,937, 5,995,724, 6,002,795, 6,025,922, 6,035,103, 6,041,200, 6,065,041, 6,112,665, 6,116,707, 6,122,407, 6,134,018, 6,141,120, 6,166,821, 6,173,286, 6,185,335, 6,201,614, 6,215,562, 6,219,155, 6,219,659, 6,222,641, 6,224,048, 6,225,974, 6,226,419, 6,238,105, 6,239,895, 6,256,108, 6,269,190, 6,271,937, 6,278,901, 6,279,009, 6,289,122, 6,292,270, 6,299,063, 6,310,697, 6,321,133, 6,327,047, 6,327,050, 6,327,052, 6,330,071, 6,330,363, 6,331,899, 6,340,975, 6,341,017, 6,341,018, 6,341,307, 6,347,256, 6,348,978, 6,356,359, 6,366,918, 6,369,895, 6,381,036, 6,400,443, 6,429,949, 6,449,393, 6,476,927, 6,490,696, 6,501,565, 6,519,053, 6,539,323, 6,543,871, 6,546,364, 6,549,294, 6,549,300, 6,550,991, 6,552,815, 6,559,958, 6,572,293, 6,590,676, 6,606,165, 6,633,396, 6,636,326, 6,643,317, 6,647,149, 6,657,741, 6,662,199, 6,678,068, 6,707,563, 6,741,262, 6,748,471, 6,753,845, 6,757,436, 6,757,440, 6,778,700, 6,781,596, 6,816,276, 6,825,943, 6,832,865, 6,836,342, RE33,973, RE36,947, D341,131, D406,117, D416,550, D417,864, D419,185, D426,206, D439,851, D444,793.

Trademarks

The APPS logo, AutoCal, Auto-Count, Balance, Best, the Best logo, BESTColor, BioVu, BioWare, ColorPASS, Colorproof, ColorWise, Command WorkStation, CopyNet, Cretachrom, Cretaprint, the Cretaprint logo, Cretaprinter, Cretaroller, DockNet, Digital StoreFront, DocBuilder, DocBuilder Pro, DocStream, DSFdesign Studio, Dynamic Wedge, EDOX, EFI, the EFI logo, Electronics For Imaging, Entrac, EPCount, EPPhoto, EPRegister, EPStatus, Estimate, ExpressPay, Fabrivu, Fast-4, Fiery, the Fiery logo, Fiery Driven, the Fiery Driven logo, Fiery JobFlow, Fiery JobMaster, Fiery Link, Fiery Prints, the Fiery Prints logo, Fiery Spark, FreeForm, Hagen, Inktenity, Inkware, Jetrion, the Jetrion logo, LapNet, Logic, MiniNet, Monarch, MicroPress, OneFlow, Pace, PhotoXposure, PressVu, Printcafe, PrinterSite, PrintFlow, PrintMe, the PrintMe logo, PrintSmith, PrintSmith Site, Printstream, Print to Win, Prograph, PSI, PSI Flexo, Radius, Rastek, the Rastek logo, Remoteproof, RIPChips, RIP-While-Print, Screenproof, SendMe, Sincolor, Splash, Spot-On, TrackNet, UltraPress, UltraTex, UltraVu, UV Series 50, VisualCal, VUTEk, the VUTEk logo, and WebTools are trademarks of Electronics For Imaging, Inc. and/or its wholly owned subsidiaries in the U.S. and/or certain other countries.

All other terms and product names may be trademarks or registered trademarks of their respective owners, and are hereby acknowledged.

Table of Contents

Introduction	4
Overview	4
Contact Information	4
Quote to Job Conversion Report	5

Introduction

Overview

This stand-alone program creates a report that shows the number of quotes vs. number of jobs generated in a time period. Not all quotes get turned into jobs. This report also shows the ratio between the quoted price and the price generated to the job. The actual invoiced amount for that quote/job is not included.

Contact Information

EFI Support

US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
US Fax:	415.233.4157
US E-mail:	printstream.support@efi.com

Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com

EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software plus offer a range of training options.

Quote to Job Conversion Report



QuoteToJobConversionReport

Quote To Job Conversion Report Selection Form Plant - 0100

☒ Estimator
☐ CSR
☐ Sales Rep.
☐ Job Type

Select Job Categories
☒ Mail Jobs
☒ Print Jobs
☒ Print And Mail Jobs
☒ Price List Jobs

Date Range
 From: 8 /28/2011
 To: 12/ 8 /2011

Filter By Customer (Leave blank to get all customers)
 Customer # ALASKA Alaska Inc.

Select Names
 Include All >>
 <<Remove All

☒ Active Only

☒ Print Quote List
☒ Filter for the Current Plant Only (Job's Plant)
☐ Ignore Quote Versions for the reporting
☒ Exclude Jobs that were created from Master Templates .
☐ For Customers Active Since 12/ 8 /2011

Rob Hales
 Betty White
 jim
 Monika Rynkiewicz
 Leah
 Susan Dabbs
 Norma Nelsen
 Cherry Terrell
 DMM Everything
 Donnie Jordan
 Chris Botsch

Preview Print Exit

Report Selections and Filters;

1. The report can be run by an Estimator, CSR, Sales Rep. or Job Type.
2. Select one or more **Job Categories** (Mail, Print, Print & Mail, Price List Jobs).
3. Enter a **Date Range**.
4. Users can filter by customer. To filter by customer, enter the Customer Number and Customer Name from the dropdown list under **Filter by Customer**.
5. Select Name(s) or Job Type(s) from the list by highlighting and clicking **Include All**. To remove, click **Remove All**.

6. To filter for Estimators, CSR's and Sales Reps, select the **Active Only** check box.
7. Check the **Print Quote** List to display quote detail in the report.
8. You can filter the current plant if you have a multi-plant environment by checking the **Filter for the Current Plant Only (Job's Plant)** box.
9. To filter for Quote Versions and quotes that were converted into jobs, check the **Ignore Quote Versions for the reporting** box.
10. To exclude jobs that were created from Master Templates, check the **Exclude Jobs that were created from Master Templates** box.
11. To filter by Customer Active date, check the **For Customers Active Since** box and enter the **Since Date** from the Master File Customer in the dropdown list.

Example report:

Quote To Job Conversion Report (from 8/28/2011 to 12/8/2011)

Print Date 12/8/2011 Page 1 of 1

Betty White

Customer Name	Acct Number	Number Of Quotes	Price	Number Of Jobs
Alaska Inc.	ALASKA			
Quote Title		Quote Number	Quoted Price	Job Number
v14 Test		5944	\$7,082.71	
Test 23		5945	\$6,927.38	
Test 23		5945.99	\$6,927.38	8136
Copy of Test 23		5949	\$6,830.79	
Testing		5953	\$2,887.76	
Testing		5953.99	\$2,902.26	8139
Paper testing		5954	\$2,924.29	
V14 Testing		5963	\$15,947.26	
Total: Alaska Inc.		8	\$52,429.83	2 25.00%
Total: Betty White		8	\$52,429.83	2 25.00%

Note Quotes copied to a 'version' are not counted when comparing # of quotes to # of jobs and the % Converted.

Estimators, CSR's and Sales Reps. are configured in the **Master File Customer**.

Job Types are configured in the **Master File Mail Process** and/or **Master File Print**.