

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

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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.

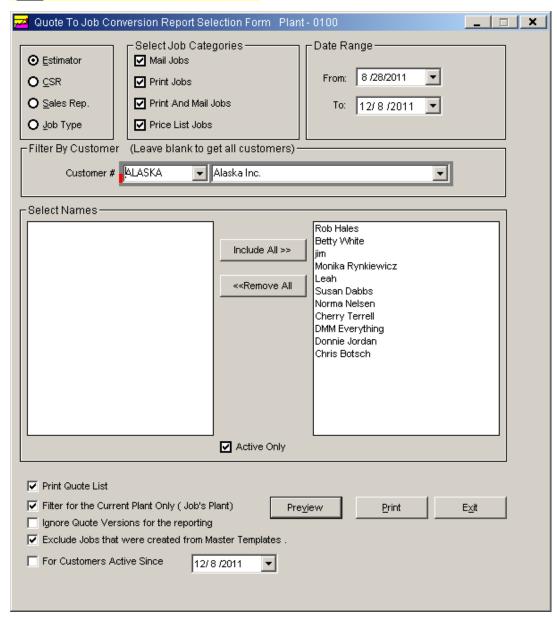
EFI Professional Services

| US Phone: | 651.365.5321 |
|-----------|---|
| US Fax: | 651.365.5334 |
| F-Mail | Professional Services Operations @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



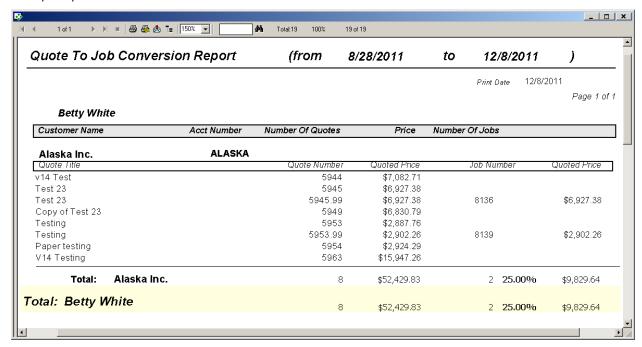


Report Selections and Filters;

- 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**.
- 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.
- 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:



Note Quotes copied to a 'version' are <u>not</u> 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.