

Quote Report

Debtors >Reports >Report list

Gives a report of all quotes in different status levels with dates and values on each quote.

Debtor Quote Report

Quote Status:

All

Date From:

2023-04-01

-

Date To:

2023-04-30

+

Commission:

All

Branch:

All

Currency:

All

Division:

All

Show Cost:

☐

Quotes Not Invoiced:

☐

Sort By:

Date

Include Division:

☐

Include Region:

☐

Include Order No:

☐

Generate

Close

This is how a debtor is selected by using the long search

Quote Status	Select from the drop-down menu which statuses of Quotes you want to pull a report for, this could be Approved quotes, Cancelled Quotes, quotes that are still in Preparation stage or rejected quotes etc.
Date From / Date To	Choose the date range for which you want to view the report from / Select a date range of when you want to see up to on the report.
Commission	Select from the drop-down menu if you want to pull the Quote report for a specific Sales Rep.

Branch	If you have more than one branch, you can pull a report per branch by selecting the branch from the drop-down menu.
Currency	If you operation with multi-currency you can pull a report for all currencies or you can select a specific currency.
Division	If you have set up divisions for your debtors, you can pull the report for all your debtors or you can select a specific Division from the drop-down menu.
Show Cost	Tick the box if you want to have the costs shown on the quote report.
Quotes Not Invoiced	
Sort By	Choose from the drop-down menu how you would like your report sorted, your options are by date or quote number
Include Division	If you have Divisions set up, you can pull a report for all divisions combined or for a specific division.
Include Region	If you have Regions set up, you can pull a report for all regions combined or for a specific division.
Include Order No	Tick the box if you would like to include customer purchase orders on the report.

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