Quotation

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The Differences in the Terminate Offer Type

As soon as you press the Completion button in the client and depending on the role settings, you get different options on how to proceed with the order.

Save

You can use the "Save" button if you may need to edit the order later because you received General Information during completion. It remains on the device and is not displayed or considered during Data Transfer.

Complete

A completed order remains on the device until you select it for transmission during a Data Transfer.

Send

The "Send" button completes the order and sends the order independently of a Data Transfer to the ERP system, provided there is an active internet connection.

Transfer to another device

If the Employee is assigned multiple Devices via the backend, they can transfer orders from one device to another. This makes sense, for example, if the order was documented on an iPhone using the photo scanner, and the remaining details such as Delivery address or Customer order number are to be added later (perhaps after approval by the customer based on an Order suggestion) on a laptop.

KPI Widgets Quotations

There are 2 widgets available in the Quotation type.

You can find KPI widgets in the "2 x 1 Widgets" type on the dashboard; further information on displaying them can be found here.

Quotations Current month

The basis for the count is the "Order date" field from the Quotation header.

1. The number shows the quantity of Quotations in the Current month.
   - Black, if the value is greater than 0
   - Red, if the value is equal to 0.
2. The blue chart shows the quantity of Quotations per Month in the last 12 Months.

Quotation status	Included in count
Non-completed Quotation	x
Completed, not transferred Quotation	x
Completed, transferred Quotation	x
Deleted Quotation	

Quotation value Current month

The basis for the calculation of the monthly values is the "Order date" field from the Quotation header.

1. The number shows the Quotation sum of the Current month without decimal places.
   - Black, if the value is greater than 0
   - Red, if the value is equal to 0.

2. The blue chart shows the values per Month from the past 12 Months. In this example screenshot, significantly more Orders were written this month than in the past 12 Months.

Quotation status	Value included in calculation
Non-completed Quotation	x
Completed, not transferred Quotation	x
Completed, transferred Quotation	x
Deleted Quotation	