Proposal Reports

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Open Proposals/Options Report

The **Open Proposals/Options** report provides a summary of all proposals and options that have not been accepted or selected. This report helps track proposals that are still in the decision-making phase and allows filtering by the date of the proposal.

This report includes:
- **Date of Proposal**: The date when the proposal was created.
- **Contact Name and Service Address**: Information about the contact and the service location.
- **Status**: The current status of the proposal (e.g., open, expired).
- **Options**: The name of the option(s) on the proposal that have not been accepted.
- **Service Name and Description:** The name of the service line, including any parts or add-ons, and the description of each.
- **Quantity**: The quantity of the service line and any parts or add-ons.
- **Selected/Unselected**: Columns indicating the dollar value of the options that have been selected or remain unselected.
- **Owner:** The name of the user that is the owner of the proposal.

Proposal Declines Report

The **Proposal Declines** report provides a count of proposals that were created within a set date range and the number of proposals that were declined. This report helps identify common reasons for proposal declines and allows for better understanding and addressing of client objections.

This report includes:
- **Count of Total Proposals:** The number of proposals created within the set date range.
- **Count of Declines**: The number of declined proposals that were created within the set date range.
- **Decline Percentage:** The percentage of created proposals within the set date range that were declined.
- **Declines grouped by Reason**
  - **Count:** How many proposals were declined with that reason.
  - **% Distribution:** What percentage of declined proposals were for that reason.
  - **% of Total:** What percentage of *all* proposals were declined for that reason.

You can configure **Proposal Decline Reasons** in **Control Panel > Proposals**.

Proposal Pivot Grid Report

The Proposal Pivot Grid is a dynamic report that allows for interactive analysis, filtering, and grouping of data. It is especially helpful for identifying trends and comparing key business metrics.

This report includes:
- **Filter Header Area**: Drag field headers to control how data is grouped into rows or columns.
- **Column Header Area**: Defines the columns of the grid.
- **Row Header Area**: Determines how data is grouped by rows.

- **Data Header Area**: Contains summarized values such as totals or counts.

Visit the **Pivot Grid help page** for more detailed instructions on using this feature.

Proposal Summary Report

The Proposal Summary report provides a summary of proposals, grouped by proposal owner.

This report includes:
- **Count of Proposals**: The number of proposals.
- **Subtotal Value**: The total value of the proposals.
- **Average Dollar Value**: The average value of the proposals.
- **Margins**: The profit margins as a percentage.

These statistics are broken apart by the status of the proposals (created, accepted, invoiced, booked, scheduled, declined).