



Year

2023

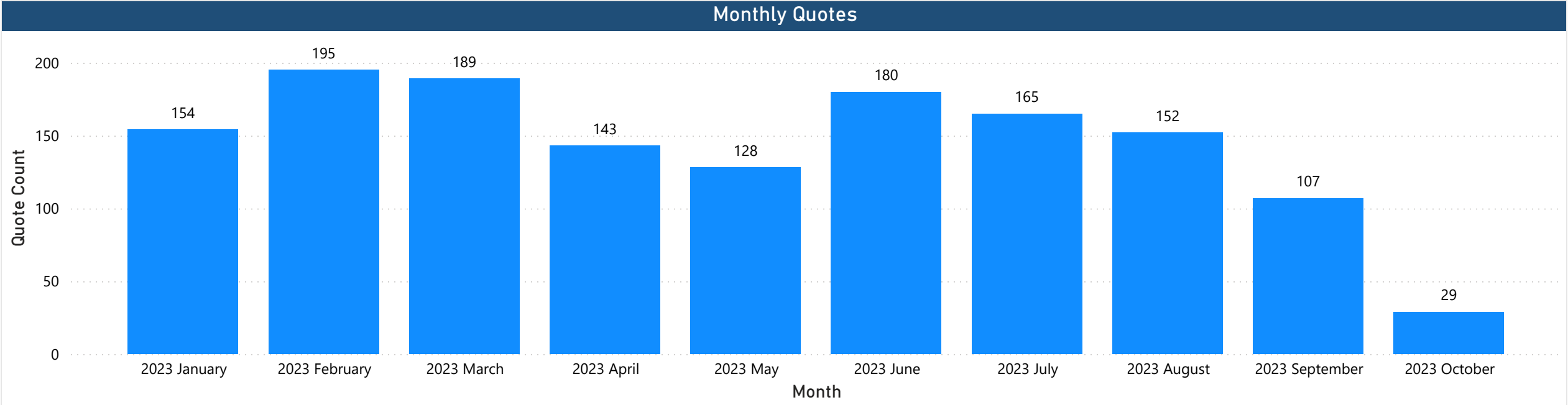
Month

All

Sales Estimator

Multiple selections

Total Quotes	Total Quotes Proposed	Total Quotes No Deal	Total Quotes Lost	Total Quotes Won	Win Rate
1,442	1,134	28	12	268	18.59%



Month	Total Quotes	Total Proposal	Total No Deal	Total Lost	Total Won	WinRate
January	154	104	18		32	20.78%
February	195	143	7	8	37	18.97%
March	189	159	2		28	14.81%
April	143	123	1		19	13.29%
May	128	111		3	14	10.94%
June	180	149			31	17.22%
July	165	97		1	67	40.61%
August	152	124			28	18.42%
Total	1,442	1,134	28	12	268	18.59%

projnumber	Project	Revenue
23-00001		60,666.00
23-00002		2,800.00
23-00021		304,262.00
23-00035		80,393.00
23-00036		80,393.00
23-00037		8,577.00
23-00042		151,356.00
23-00043		1,125.00
Total		26,990,897.00

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Sales Estimator
Multiple selections

Customer Name
All

Project Number
All

Total Quotes	Total Quotes Proposed	Total Quotes No Deal	Total Quotes Lost	Total Quotes Won	Win Rate
1,442	1,134	28	12	268	18.59%

Year	Month	Day	Sales Estimator	Customer Name	Project Number	Project Name	Sales Stage	Revenue
2023	January	31			23-00152	Chassis	Proposal	212,232.00
2023	January	4			23-00015	Dell Durham Data Center	Proposal	419,659.00
2023	January	6			23-00022	500 Gallon hospital day tank	Proposal	18,916.00
2023	January	10			23-00034	Prex Eagle Academy Data Center	Proposal	172,119.00
2023	January	10			23-00039		Proposal	24,484.00
2023	January	11			23-00040	Berkeley Hospital Expansion 750kw	Proposal	147,651.00
2023	January	11			23-00041	Berkeley Hospital Expansion 1250kw	Proposal	191,268.00
2023	January	13			23-00055	Holocaust Museum	Proposal	162,148.00
2023	January	13			23-00056	O.C. Juvenile Assessment Center	Proposal	115,230.00
2023	January	17			23-00065	Valencia Grand	Proposal	32,673.00
2023	January	17			23-00068	NAS Beach Tower	Proposal	290,414.00
2023	January	17			23-00078	SALVATION ARMY 500kw	Proposal	38,192.00
2023	January	18			23-00081	360 International	Proposal	136,978.00
2023	January	19			23-00089	UTILITY TRUCK BODY PAINTING	Won	9,710.00
2023	January	19			23-00091	City Of Hollywood Replacement tank	Proposal	18,461.00
2023	January	20			23-00095	13-15551 Replacement Floats	Proposal	994.00
2023	January	20			23-00096	Blue Springs Holly Ave	Proposal	106,140.00
2023	January	24			23-00118	Wood Bridge School	Proposal	62,303.00
2023	January	25			23-00121	NOVO Project	Proposal	418,971.00
2023	January	26			23-00125	Modera Baldwin Park	Proposal	15,353.00
2023	January	26			23-00129	MGI Project X 1250kw	No Deal	202,607.00

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Sales Estimator
Multiple selections

Customer Name
All

Project Number
All

Total Quotes

1,442

Total Quotes Proposed

1,134

Total Quotes No Deal

28

Total Quotes Lost

12

Total Quotes Won

268

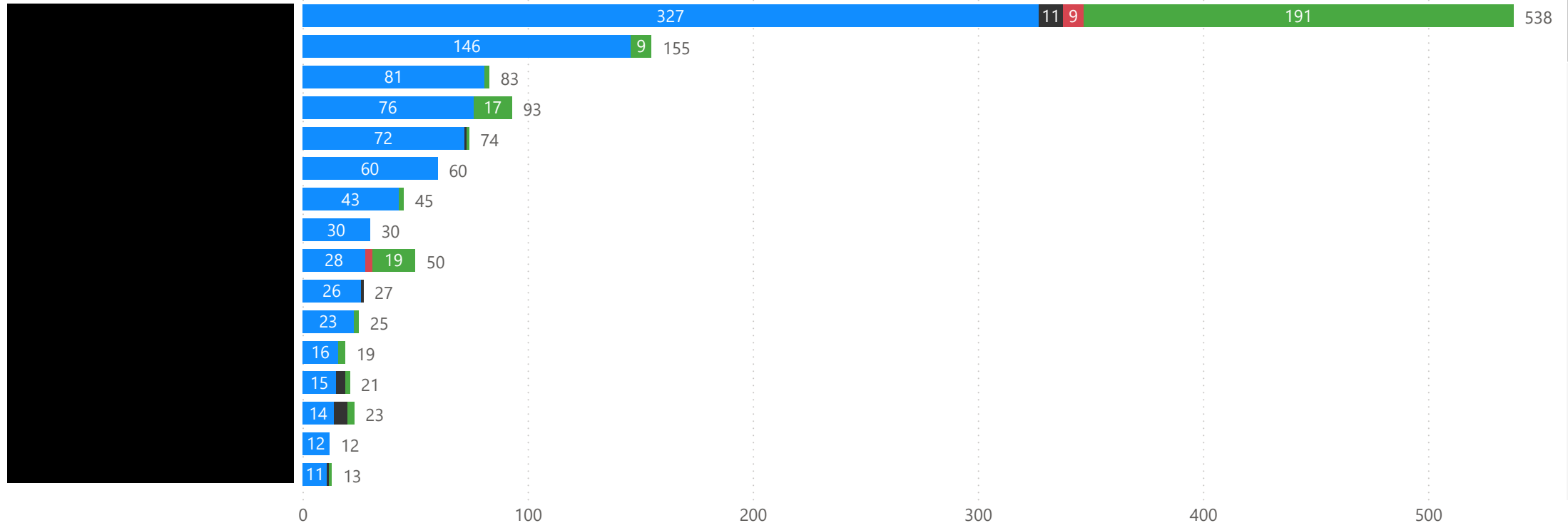
Win Rate

18.59%

Quotes by Customer

● Total Proposal ● Total No Deal ● Total Lost ● Total Won

Customer Name



Count

Year

2023

Month

All

Sales Stage

Multiple selections

Sales Estimator

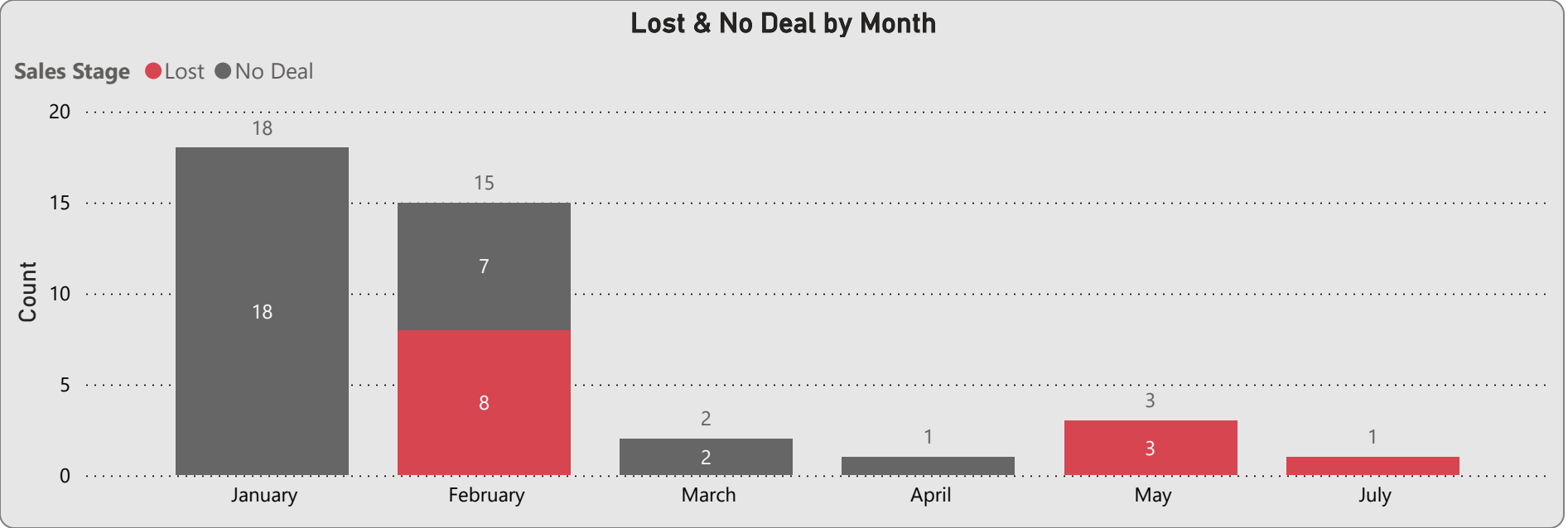
Multiple selections

Total Quotes
1,442

Total Quotes No Deal
28

Total Quotes Lost
12

Total Lost & No Deal by Reason			
CRM Reason	Lost	No Deal	Total
	1	5	6
Customer Didn't Get Order		8	8
Other	10	14	24
Others Won/PP Didn't Quote	1		1
Price,Other		1	1
Total	12	28	40



Lost				
projnumber	Project	Revenue	Sales Stage	Lost
23-00255		267,314.00	Lost	Other
Total		1,452,186.00		

No Deal				
projnumber	Project	Revenue	Sales Stage	LostComm
23-00008		17,012.00	No Deal	
23-00009		409,604.00	No Deal	
23-00016		20,013.00	No Deal	
Total		3,173,674.00		

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All

Customer Name

All

Sales Estimator

Multiple selections

Gen Manufacturer

All

Total Quotes

1,442

Total Quotes Proposed

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Total Quotes No Deal

28

Total Quotes Lost

12

Total Quotes Won

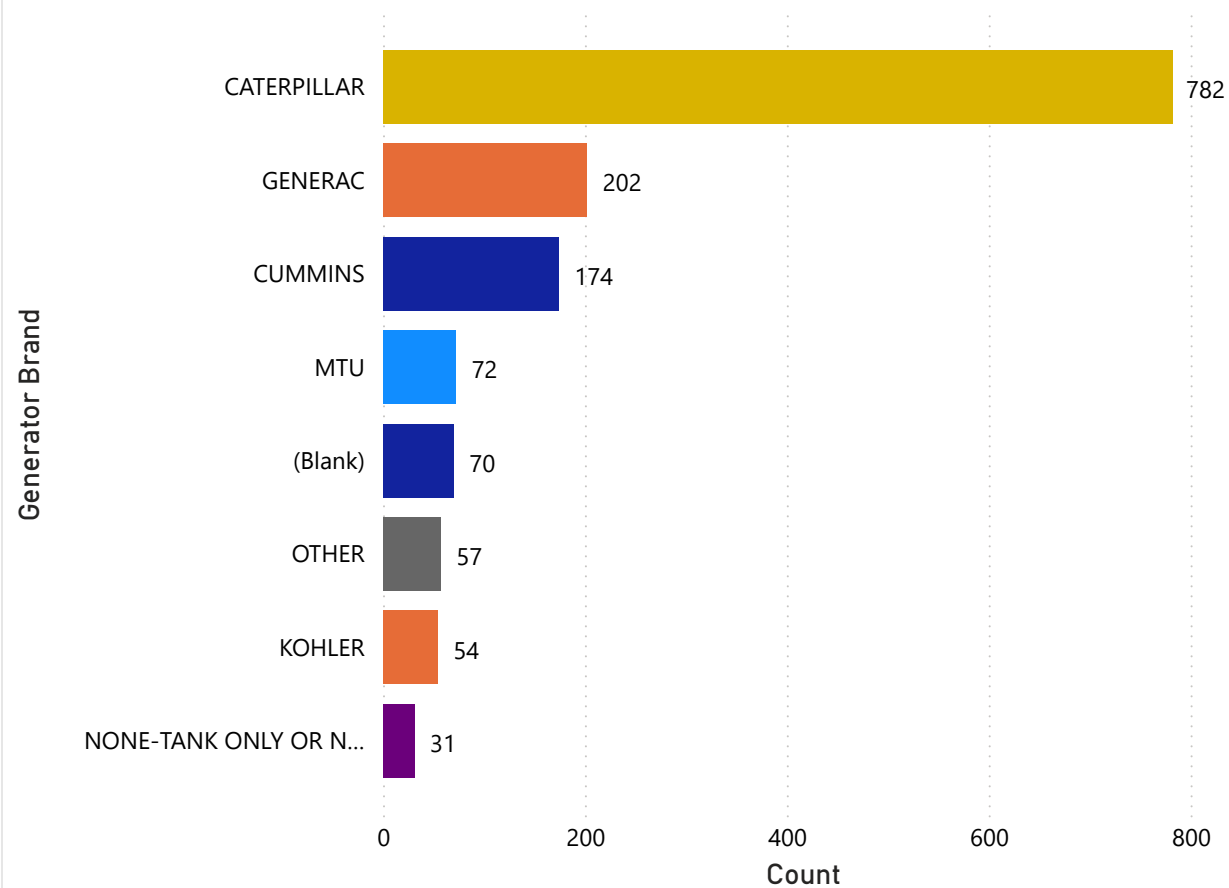
268

Win Rate

18.59%

Generator Quote Data

Make ● CATERPILLAR ● GENERAC ● CUMMINS ● MTU ● (Blank) ● OTHER ● KOHLER ● NONE-TAN...



Phoenix Products: Product Type

● Total Proposal ● Total Lost ● Total No Deal ● Total Won

