



# Order Book Analysis

OneOffice Order Book Analysis offers a new perspective on your organisation's trading performance. Whereas Sales Analysis is concerned with historical information, Order Book focuses on order intake, billing and aspects such as quotation conversions at a time when the business outcome can still be influenced.

## Key Features at a Glance

- Proactively monitor Order Book status
- Reporting periods can vary from company accounting period
- Multiple analysis groups such as salesperson, product group and customer.

## Benefits

- Visibility of future order book can avoid 'surprises'
- Can highlight sensitivity to key orders and customers
- Early warning of under performing salespeople, product lines etc.

## Introduction

Any business focused on making margin from volume distribution will need to closely monitor order intake and status. Order Book Analysis helps you quantify these key performance indicators and ensure that the business is on track.

## Key Features

- Management overview of current sales and potential sales
- Daily update of recorded changes to sales order statuses
- Deletion records trigger for key changes of sales order header fields

- Tracks changes to the line required date of sales orders.
- Current Order Book Report
- Order Book Reporting

## Order Book Periods

Order book periods are easily customised and need not correspond with system-wide accounting periods. The base unit can be any of days, weeks, months or the 'General Ledger period', and users can choose how many of these constitute one order book period (e.g. seven days, four weeks, etc.).

Order Book		Period		YTD		Rep		Value		Margin	
New Quotes	82,756			294,857	052	361,837.0	74935.0				21.0
Converted Quotes	33,068			150,012	102	330,275.0	60563.0				18.0
New Orders	671,438			2,705,548	148	513,303.0	63802.0				13.0
Invoiced Orders	484,360			1,608,423	048	3300.0	871.0				20.0

  

Order Book Revenue By Rep in Sales Team		Period To Date		Year To Date				
Rep	Order Book Rev	COGS	Margin	Margin %	Order Book Rev	COGS	Margin	Margin %
Mico Birman	21,493.5	17,843	5,650.5	16.98	26,673.36	20,042.9	6,630.46	24.88
Paul Godfrey	103,926.52	79,374.26	24,552.27	23.61	202,049.8	137,657.59	64,392.2	31.85

  

Order Book Revenue By Product Group in Sales Team		Period To Date		Year To Date				
Group	Order Book Rev	COGS	Margin	Margin %	Order Book Rev	COGS	Margin	Margin %
01	26,149.25	22,639.47	3,509.78	13.42	129,317.9	83,029.9	46,288	35.79
02	809.7	638.7	171	21.12	564.7	755	199.7	20.92
03	5,279.88	4,800	479.88	9.09	5,279.88	4,800	479.88	9.09
04	2,399.8	1,999.8	400	16.67	2,399.8	1,999.8	400	16.67
05	809.7	4,850.2	-4,041	-499.07	809.7	4,850.2	-4,041	-499.07
06	5,999.6	4,799.6	1,200	20	5,999.6	4,799.6	1,200	20
07	2,095	1,664	431	20.57	2,095	1,664	431	20.57
08	6,110	4,285	1,825	29.87	6,110	4,285	1,825	29.87
09	51,005	31,250	19,775	38.76	51,032.8	31,256.5	19,776	38.75
10	125.99	110.99	15	11.91	125.99	110.99	15	11.91
11	5,199.6	4,000	1,199.6	23.07	5,199.6	4,000	1,199.6	23.07
12	19,398.5	16,179	3,219.5	16.6	19,398.5	16,179	3,219.5	16.6

Figure 1. OneOffice Order Book Analysis can provide extensive analysis of the order book status. This example is shows information by Product Group, by Sales Person and Summary Information displayed in a Managers Dashboard in Workspace™.



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## Analysis Fields

A large number of reports and enquiries are available. For rapid access it is possible to define a single key field headline analysis field for example:

- representative
- product group
- van area.

It is also possible to specify customer account and product code as two additional fast access keys and to record the order book by sales location.

## Analysis Available

Sales value, cost and quantity can be recorded for all or any of the following data types

- New sales orders
- Amendments to sales orders
- Credit notes invoiced
- Deletion of sales orders
- New quotations
- Amendments to quotations
- Conversion of quotations
- Credit notes added
- Credit notes invoiced

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