

SALES

CUSTOMERS - PRINT CALL REPORT

The Call Report feature allows you to print a Call Report for the selected Customer.

Ribbon Access: Sales > Customers



- 1. The *Customer Listing* screen will be displayed.
- 2. Select the *Site* where the Customer can be located.
 - The example has *Durban* selected.
- 3. Select the *Status* for the Customer.
 - The example has *Active* selected.
- Select the *row* of the Customer whose Call information you would like to work with.
- 5. Click on the *Call History* tile.



Print Call Report

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- 6. The *Calls for Customer* [] screen will be displayed.
- 7. Select the *Site* and *Call Status*.
 - The example has *Durban* selected and the status has been set to *New*.
- 8. Click on the *row* of the Call you wish to print the call report for.
- 9. Click on *Print* and select *Call Report* from the Print Options menu.



Print Call Report

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- 10. When you receive the *Report Generation* message;
 - Do you want to print the call report for call []?
- 11. Click on **Yes** to proceed.

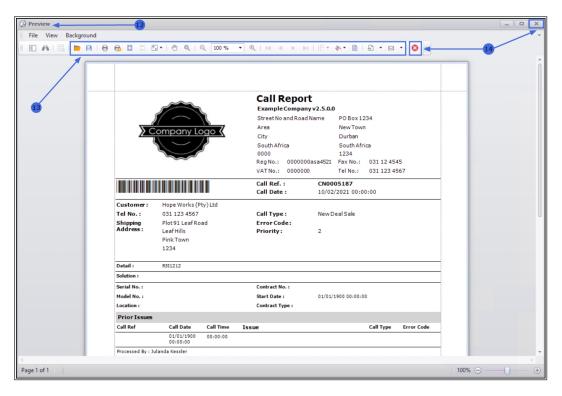
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- 12. The Call Report for the Call will be displayed in the *Preview* window.
- 13. You can make cosmetic adjustments to the report, as well as *Save*,

Zoom, Add a Watermark, Export or Email.

14. Close the preview screen to return to the Calls for Customer screen.



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