

# **SALES**

## **CUSTOMERS - DELIVERY REPORT**

The Delivery Report combines all issues made on the Call.

#### 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.



### **Delivery Report**

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			OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456
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			LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	123456
			GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	123456
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## **PRINT DELIVERY REPORT**

- 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 *In Progress*.
- 8. Click on the *row* of the Call you wish to print the delivery report for.
- 9. Click on *Print* and select *Delivery Report* from the Print Options menu.



#### **Delivery Report**

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





- 12. The Call Delivery Note 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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