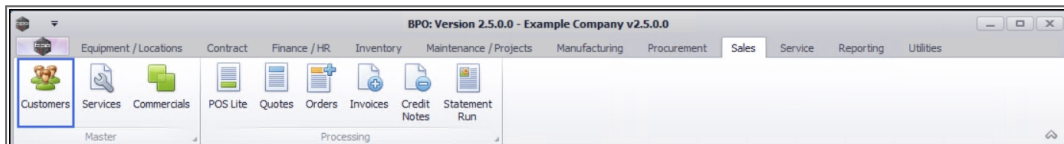


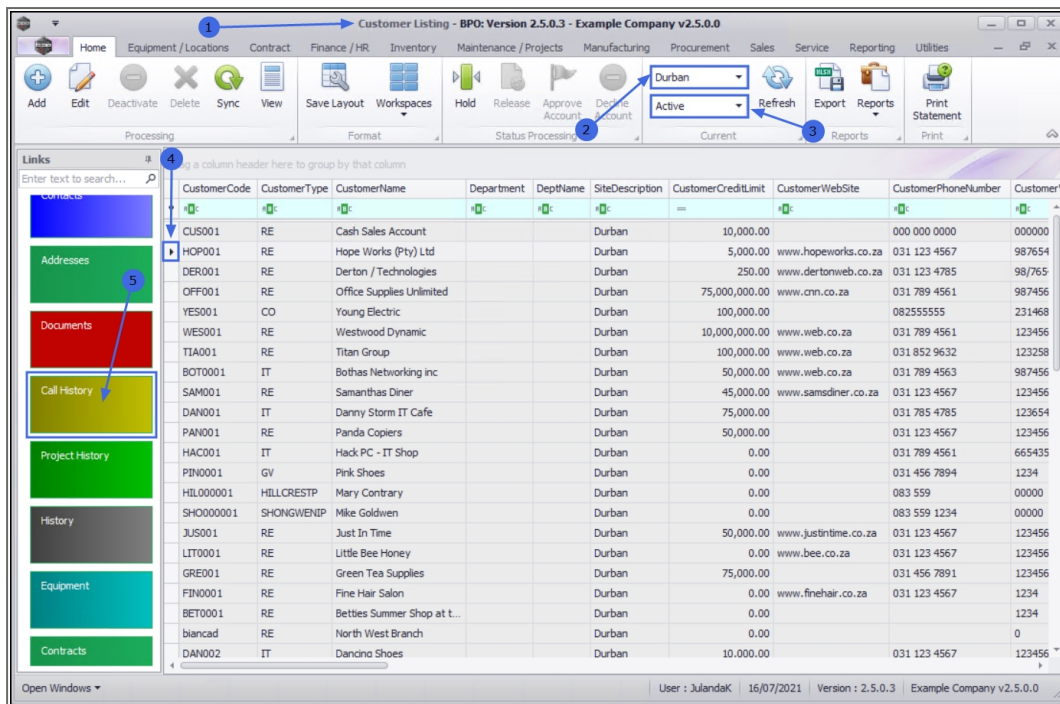
SALES

CUSTOMERS – SERVICE HISTORY REPORT

Ribbon Access: *Sales > Customers*

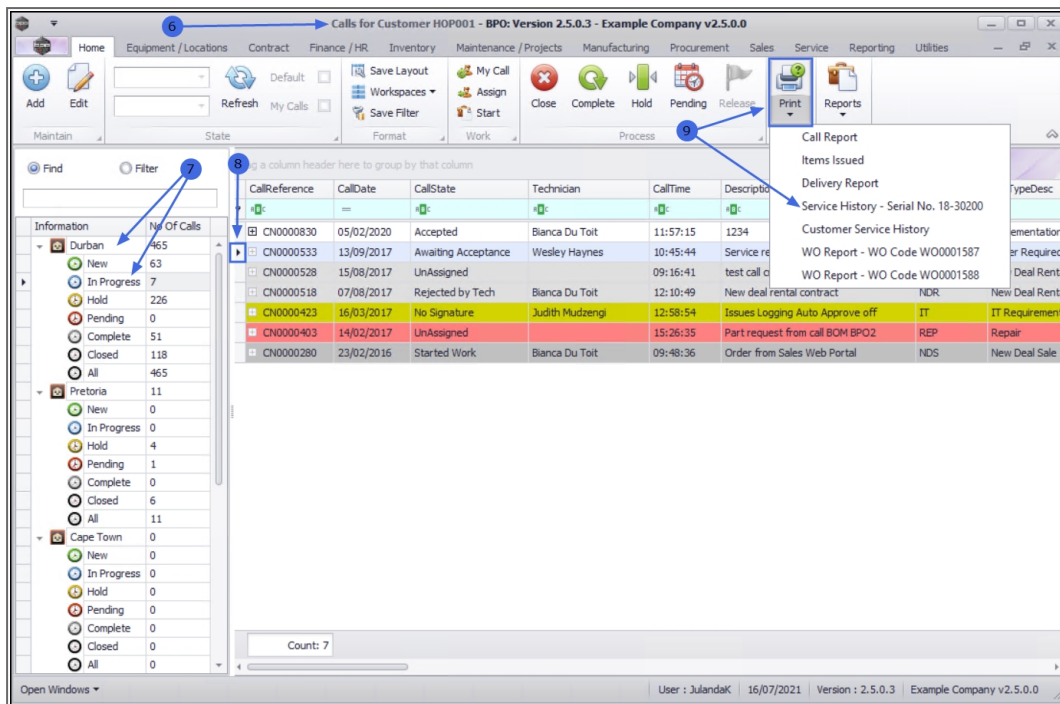


1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the Customer can be located.
 - The example has **Durban** selected.
3. Select the **Status** for the Customer.
 - The example has **Active** selected.
4. Select the **row** of the Customer whose Call information you would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



PRINT SERVICE HISTORY REPORT

- The **Calls for Customer []** screen will be displayed.
- Select the **Site** and **Call Status**.
 - The example has **Durban** selected and the status has been set to **In Progress**.
- Click on the **row** of the Call you wish to print the service history report for.
- Click on **Print** and select **Service History - Serial No. []** from the Print Options menu.



6

7

8

9

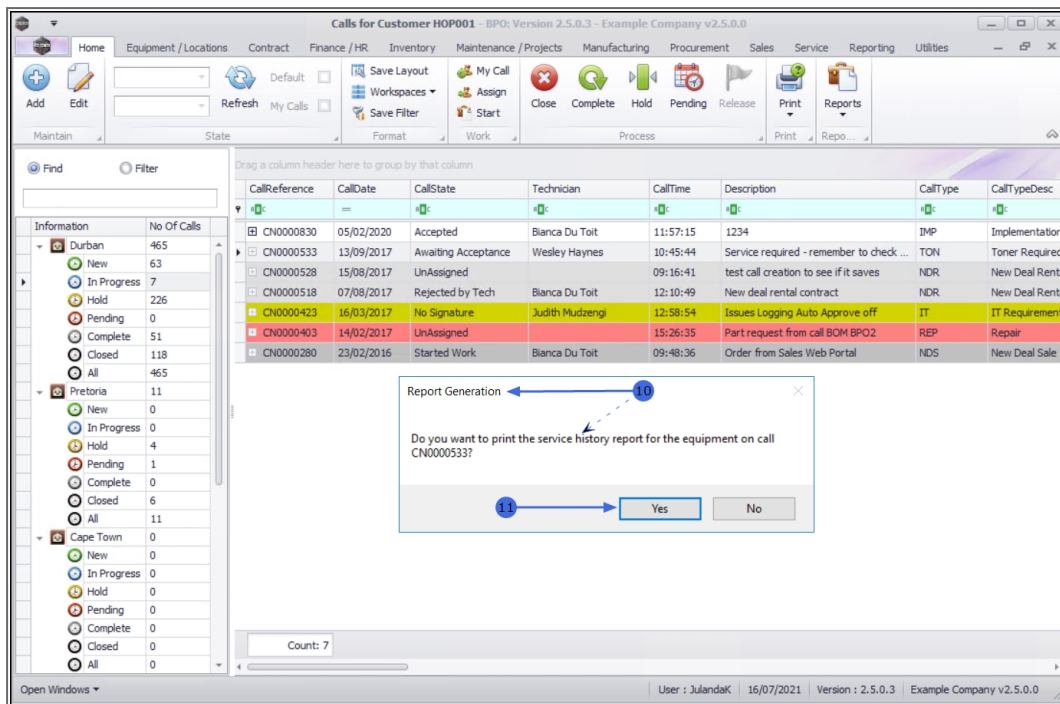
10

11

Count: 7

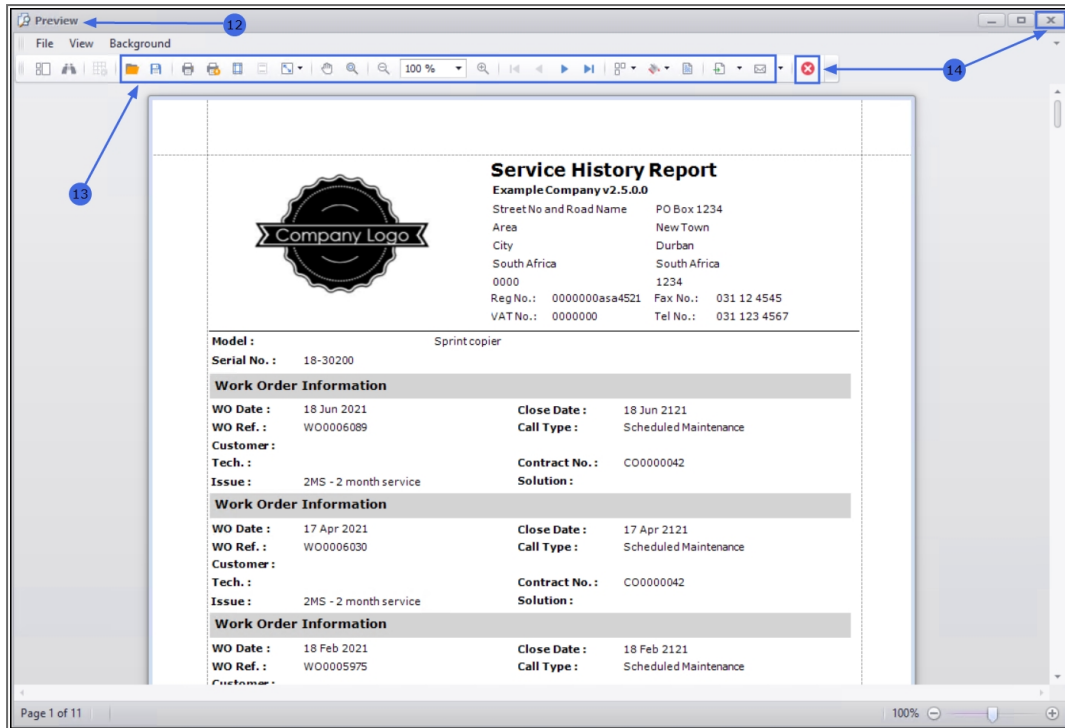
User : JulandaK | 16/07/2021 | Version : 2.5.0.3 | Example Company v2.5.0.0

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



CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CN0000830	05/02/2020	Accepted	Bianca Du Toit	11:57:15	1234	IMP	Implementation
CN0000533	13/09/2017	Awaiting Acceptance	Wesley Haynes	10:45:44	Service required - remember to check ...	TON	Toner Required
CN0000528	15/08/2017	UnAssigned		09:16:41	test call creation to see if it saves	NDR	New Deal Renta
CN0000518	07/08/2017	Rejected by Tech	Bianca Du Toit	12:10:49	New deal rental contract	NDR	New Deal Renta
CN0000423	16/03/2017	No Signature	Judith Mudzengi	12:58:54	Issues Logging Auto Approve off	IT	IT Requirement
CN0000403	14/02/2017	UnAssigned		15:26:35	Part request from call BOM BPO2	REP	Repair
CN0000280	23/02/2016	Started Work	Bianca Du Toit	09:48:36	Order from Sales Web Portal	NDS	New Deal Sale

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.



MNU.061.066

