

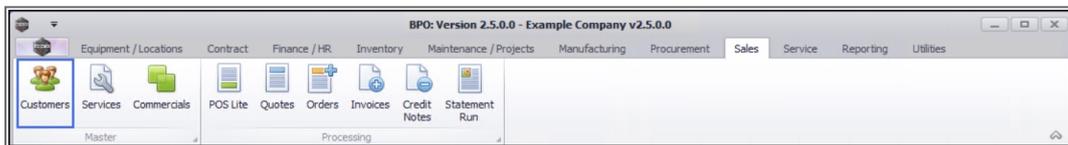
We are currently updating our site; thank you for your patience.

SALES

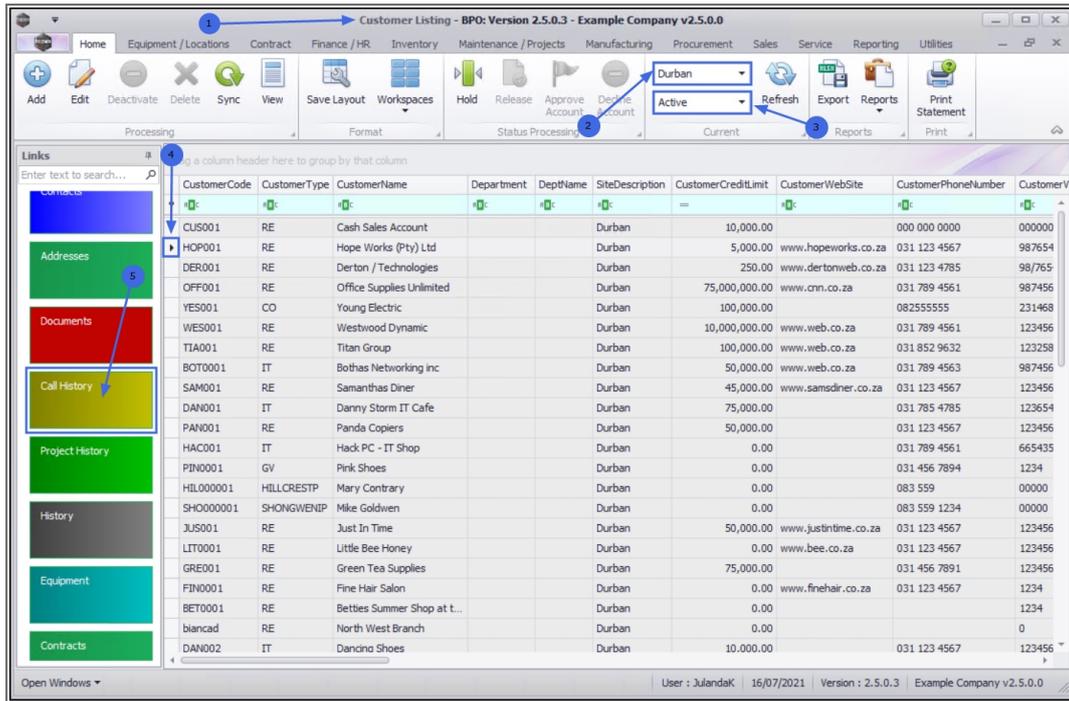
CUSTOMERS – PRINT CALL REPORT

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

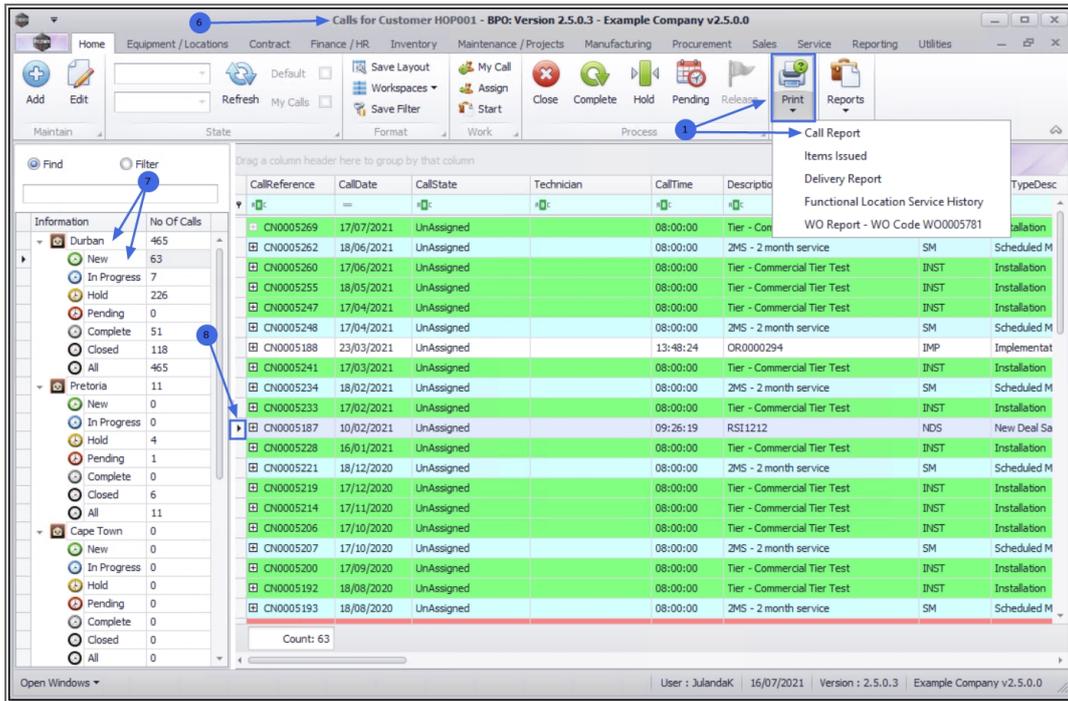
Ribbon Access: Sales > Customers



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.
4. Select the **row** of the Customer whose Call information you would like to work with.
5. Click on the **Call History** tile.



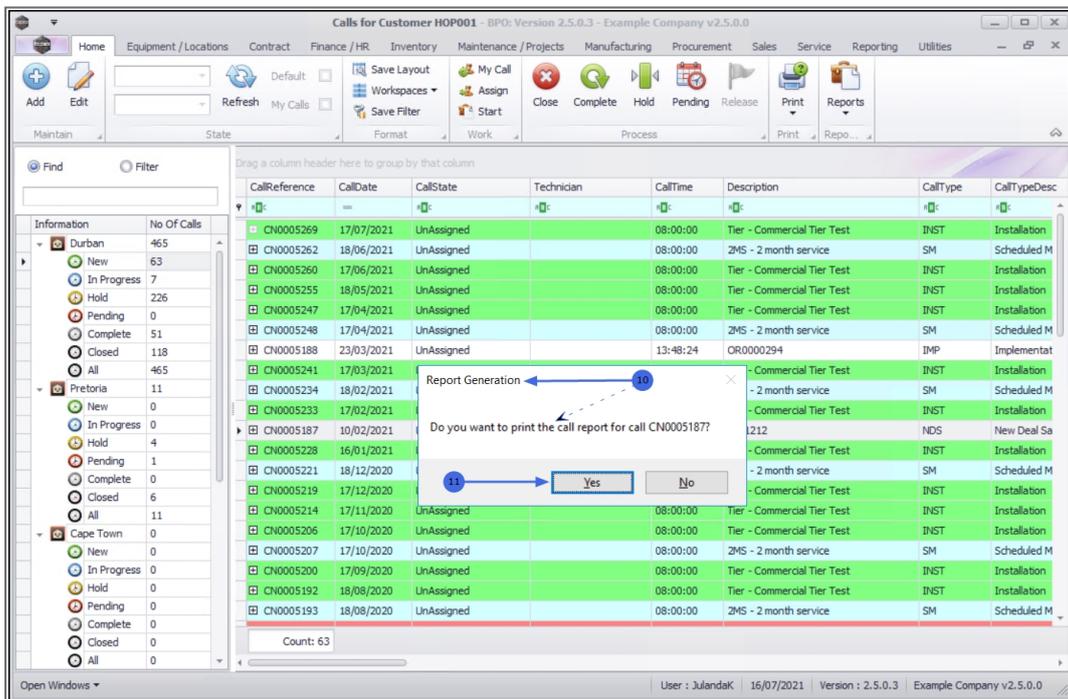
6. The **Calls for Customer []** screen will be displayed.
7. Select the **Site** and **Call Status**.
 - The example has **Durban** selected and the status has been set to **New**.
8. Click on the **row** of the Call you wish to print the call report for.
9. Click on **Print** and select **Call Report**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



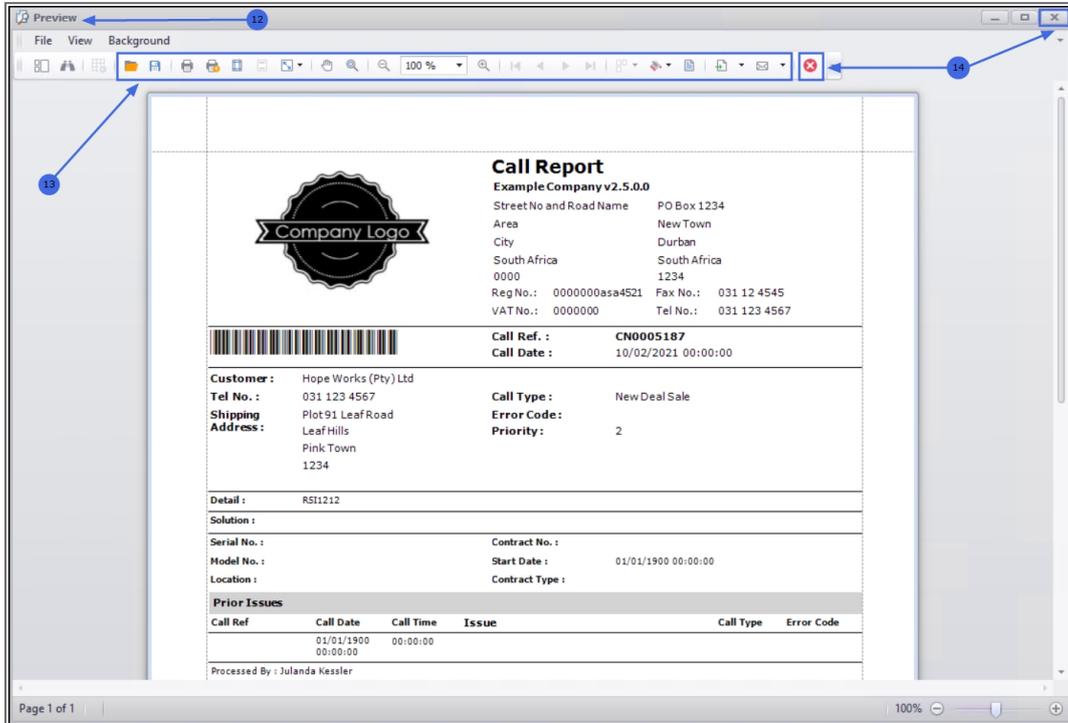
10. When you receive the **Report Generation** message;

- Do you want to print the call report for call []?

11. Click on **Yes** to proceed.



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.



MNU.061.063