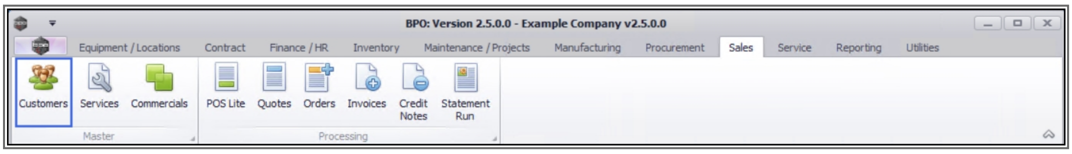
SALES

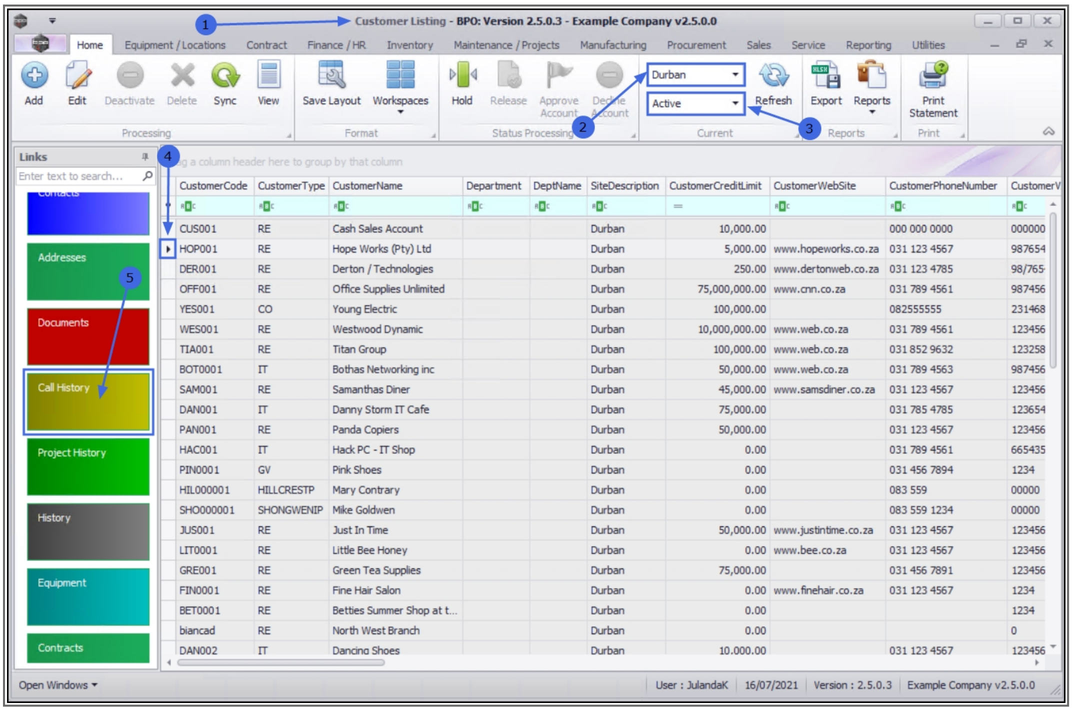
CUSTOMERS - PRINT CALL REPORT

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

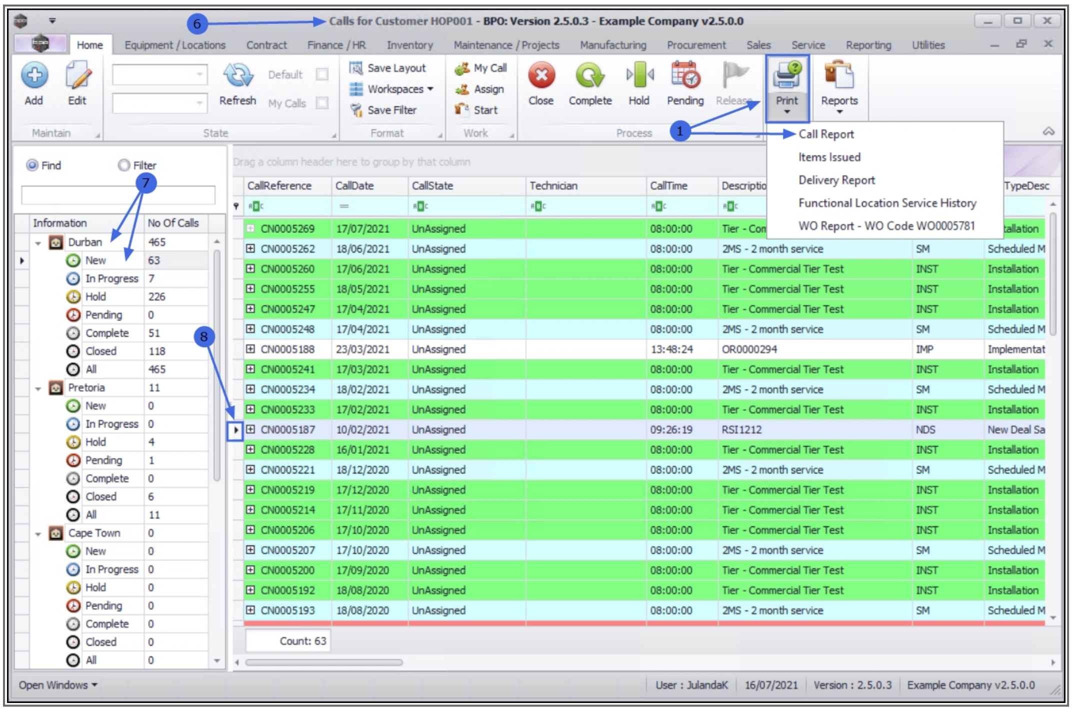
Ribbon Access: *Sales > Customers*



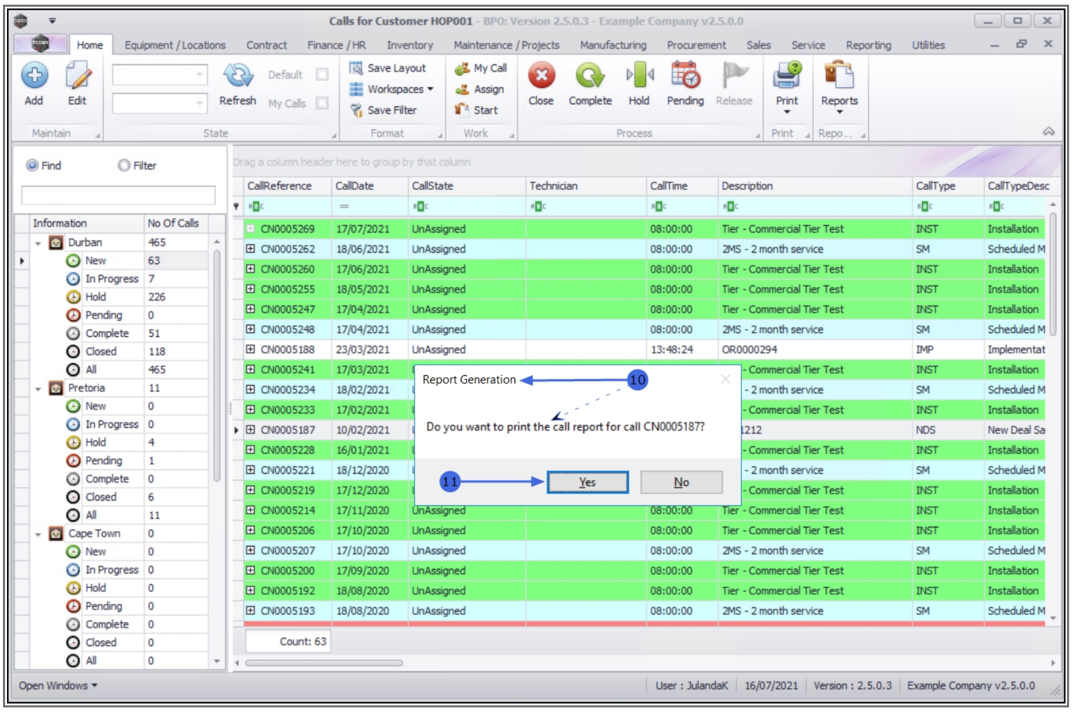
1. The ***Customer Listing*** screen will be displayed.
2. Select the ***Site*** where the Customer can be located.
    - The example has ***Durban*** selected.
3. Select the ***Status*** for the Customer.
    - The example has ***Active*** selected.
4. Select the ***row*** of the Customer whose Call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



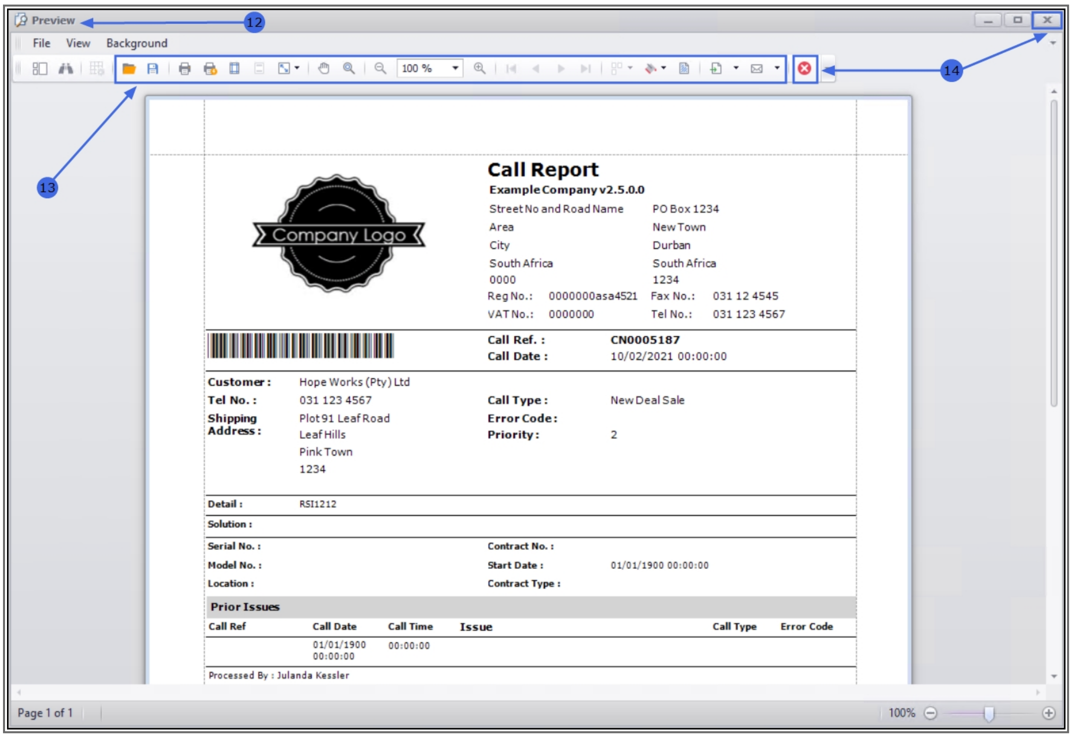
6. The ***Calls for Customer [ ]*** screen will be displayed.
7. Select the ***Site*** and ***Call Status***.
   - The example has ***Durban*** selected and the status has been set to ***New***.
8. Click on the ***row*** of the Call you wish to print the call report for.
9. Click on ***Print*** and select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



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