

SALES

CUSTOMERS - ITEMS ISSUED HISTORY REPORT

The Call Report feature allows you to print an Items Issued History Report for the selected Customer.

Ribbon Access: Sales > Customers

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- 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.



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PRINT ITEMS ISSUED HISTORY 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 *New*.
- 8. Click on the *row* of the Call you wish to print the items issued report for.
- 9. Click on *Print* and select *Items Issued* from the Print Options menu.



Items Issued History Report

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

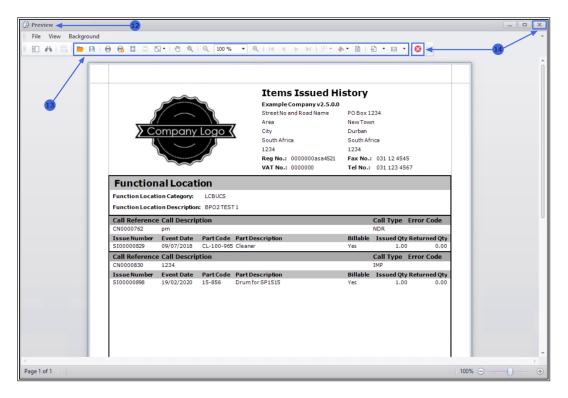
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- 12. The Items Issued History Report for the Call will be displayed in the *Preview* window.
- 13. You can make cosmetic adjustments to the report, as well as *Save*,

Zoom, Add a Watermark, Export or Email.

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



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