

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

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.

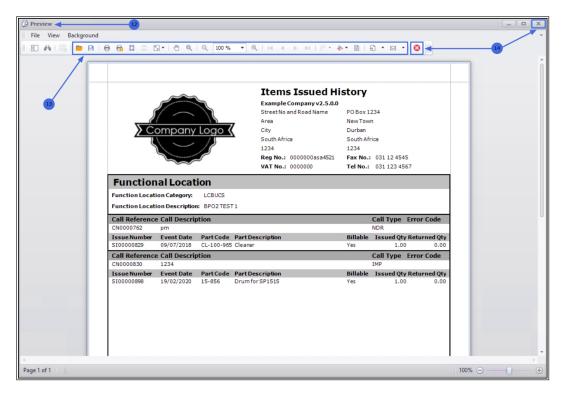
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- 12. The Items Issued History Report for the Call will be displayed in the **Pre-view** window.
- 13. You can make cosmetic adjustments to the report, as well as **Save**,

Zoom, Add a Watermark, Export or Email.

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



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