

Customer Call Report

Generation Date 5/19/2024
Generation Time 4:50:59PM

Phone : _____ **Fax :** _____
Email : _____

Account Information

Acc. ID	Federal Tax ID
Acc. Rep	State Tax ID
Primary Contact	Prev. Ord. Date
Term Available	Acc. Website
Acc. Type	Key Acc. (Y/N)

Total Balance Due		Order Totals		Ship Totals	
Current Balance		Booked YTD		Shipped YTD	
Past Due 1-30 days		Year-to-Date Average		Shipped LYTD	
Past Due 31-60 days		Booked LYTD		Shipped LY	
Past Due 61-90 days		Last Year Average		Shipped 2Y	
Past Due > 91 days					

Product Lines Purchased

Product Line	Book Current	Orders Current	Orders Last	Average Current	Average Last	Last Order
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Ship To Locations

Ship ID	Name and Address	YTD Sales	LYTD Sales	% Change	YTD Ship	LYTD Ship	% Change
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Orders placed within the last 365 days with a status of completed or cancelled

Ship To	Ship To Name	OrderDate	PO	Source	Status	ReqDate	OrderTotal	ShipTotal
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Phone : _____ **Fax :** _____
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Open Order Line Item History

Ship ID:

Order Number:

PO Number:

Req Date:

Line #	ProductID	Description	Qty	Price	ShipDate
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Cancelled Order Line Item History

Ship ID:

Order Number:

PO Number:

Line #	ProductID	Description	Qty	Price	ShipDate
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SKUs shipped within the last 365 days

Ship ID:

Item	Description	Price	Total Ord Qty	Total Shipped	Qty On Hand	Suggested Qty