Customer Call Report

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

Ship To Locations

Ship ID	Name and Address	YTD Sales	LYTD Sales	% Change	YTD Ship	LYTD Ship	% Change

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

Phone :   **Fax :**

Email :

Open Order Line Item History

Ship ID:

Order Number: **PO Number:**   **Req Date:**

Line #	ProductID	Description	Qty	Price	ShipDate

Cancelled Order Line Item History

Ship ID:

Order Number: **PO Number:**

Line #	ProductID	Description	Qty	Price	ShipDate

SKUs shipped within the last 365 days

Ship ID:

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