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	
Current Balance	
Past Due 1-30 days	
Past Due 31-60 days	
Past Due 61-90 days	
Past Due > 91 days	

Order Totals	
Booked YTD	
Year-to-Date Average	
Booked LYTD	
Last Year Average	

Ship Totals	
Shipped YTD	
Shipped LYTD	
Shipped LY	
Shipped 2Y	

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