

## Customer Call Report

**Generation Date** 5/29/2024  
**Generation Time** 5:32:41AM

**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	Book	Orders	Orders	Average	Average
Line	Current	Current	Last	Current	Last

## 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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## 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