

# Customer Call Report

Generation Date	5/19/2024
Generation Time	8:13:36PM

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
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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 :** \_\_\_\_\_  
**Email :** \_\_\_\_\_

## 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