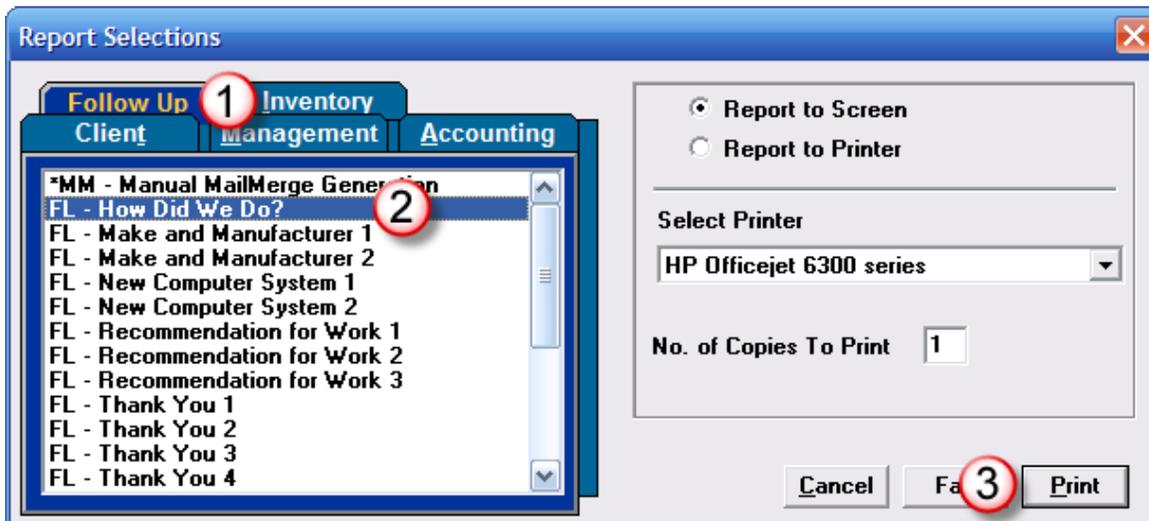
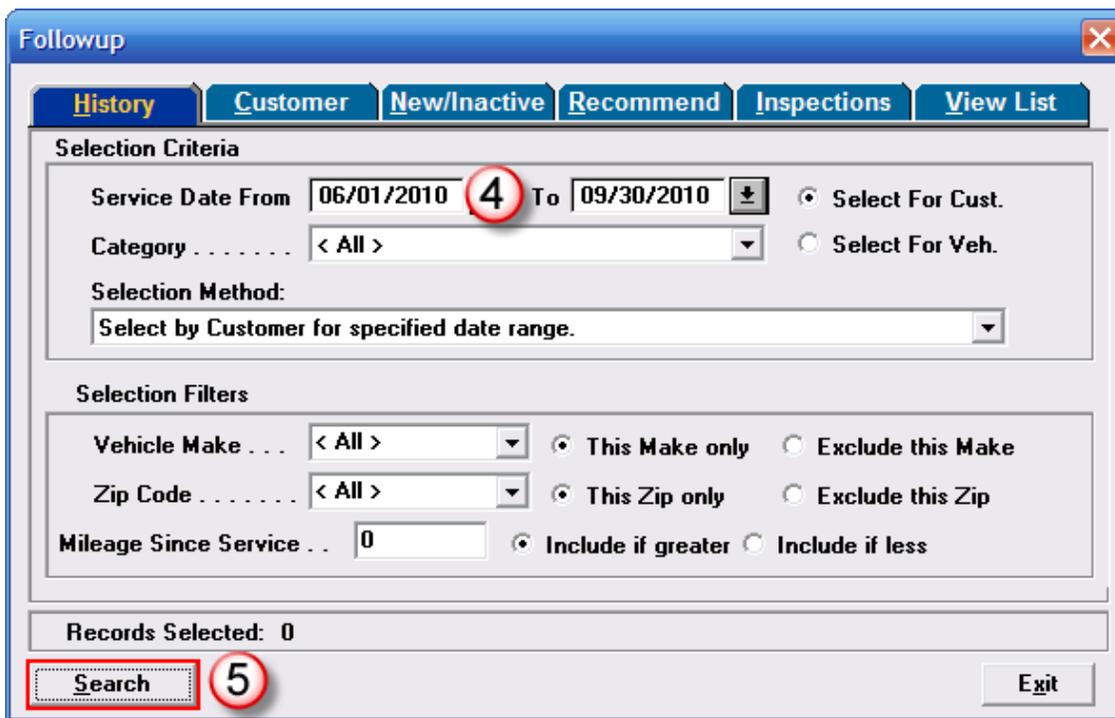


## How to Create a Followup Customer Call Report

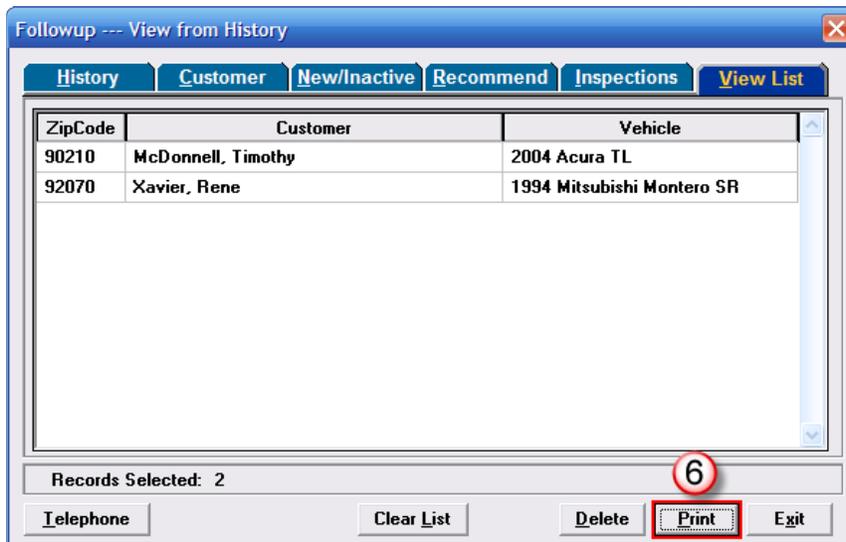
1. Go to **Reports – Followup** tab.
2. Select any **FL** (follow-up letter) or **PC** (postcard) entry to access to Followup tabs.
3. Double-click on report name or click **Print** to begin process.



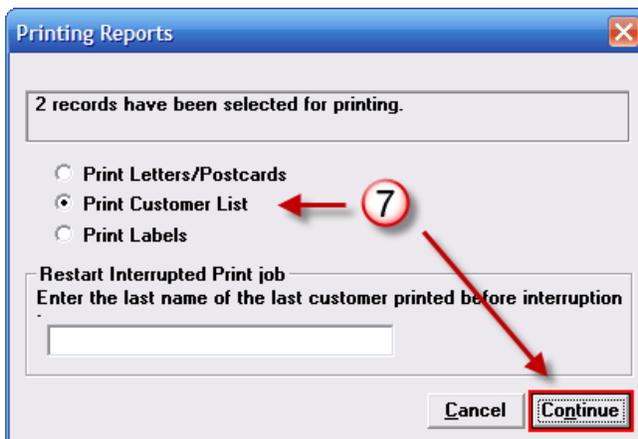
4. Set the **date range** (week, month, etc) and any other desired parameters.
5. Click on **Search** to build the list.



6. Click on the **Print** button to gain access to output options.



7. Choose 'Print Customer List' option and click **Continue**.



8. Choose the sorting parameter and click **Print**. See sample report on next page.



Sample report page with contact information and work details highlighted:

**Forward Thinking Automotive**  
1115 Main St  
Poway, CA, 90210  
Phone - 858-555-1212 Fax - 858-555-1312

**Customer List Sorted by Invoice Date**

From: 06/01/2010 To: 09/30/2010 Print Date : 09/29/2010

06/01/2010  
Rene Xavier  
9876 Nebula Way  
Santa Ysabel, CA, 92070

Home 619-789-4488

Vehicle: 1994 Mitsubishi - Montero SR-3.5L V6 VIN (M), OUTFAR, Last Service Date 06/01/2010  
Invoice: 146720, Posted On: 06/01/2010, SW: McDonnell, Tim

Average Daily Mileage: 32  
Odometer In: 0 Odometer Out: 0

Time	Description	Part No.	Category	Technician	Qty	Sale	Extd	Price	Rate
1.00	Inspect charging system		Charging & Starting System	Select Please	1.00	90.00	90.00		90.00
1.00	Diagnose cause of hesitation, stumble or sag		Engine Performance/Fuel	Select Please	1.00	90.00	90.00		90.00
<b>Totals for Invoice:</b>						180.00	180.00	1.11	184.11

09/28/2010

Timothy McDonnell  
77 Sunset Strip  
Beverly Hills, CA, 90210

Home 888-777-1212  
Office 888-787-8788

Vehicle: 2004 Acura - TL, DVDSACD, Last Service Date 09/28/2010  
Invoice: 146727, Posted On: 09/28/2010, SW: McDonnell, Tim

Average Daily Mileage: 103  
Odometer In: 106221 Odometer Out: 0

Time	Description	Part No.	Category	Technician	Qty	Sale	Extd	Price	Rate
4.50	TIMING BELT - Remove & Replace			Select Please	4.50	405.00	405.00		90.00
0.30	(Combination) CAM/SHAFT SEAL - Remove & Re			Select Please	0.30	27.00	27.00		90.00
0.20	(Combination) CAM/SHAFT SPRING - Remove			Select Please	0.20	18.00	18.00		90.00
0.10	(Combination) TIMING BELT TENSIONER - Rear			Select Please	0.10	9.00	9.00		90.00
0.70	WATER PUMP - Remove & Replace - [Includes: ]			Select Please	0.70	63.00	63.00		90.00
0.00	Multi Rib Belt	W1000-117823		Select Please	1.00	37.38	37.38		37.38
0.00	Timing Belt Kit w/o w/pmp or hyd/tens rr	A5006-178032		Select Please	1.00	184.96	184.96		184.96
0.00	Water Pump OEM	G3000-167512		Select Please	1.00	136.04	136.04		136.04
<b>Totals for Invoice:</b>						880.38	880.38	7.48	918.63