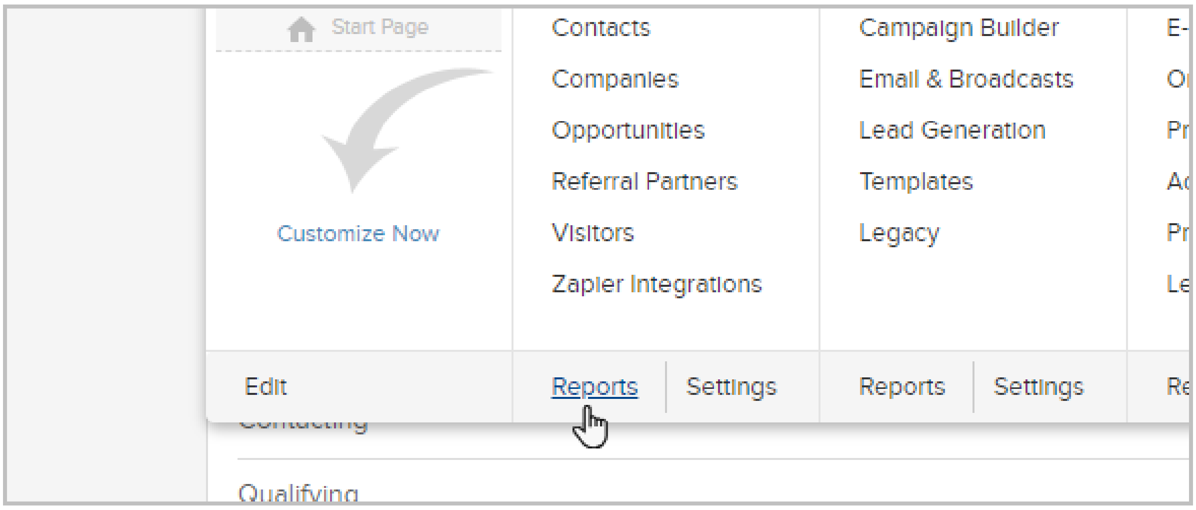
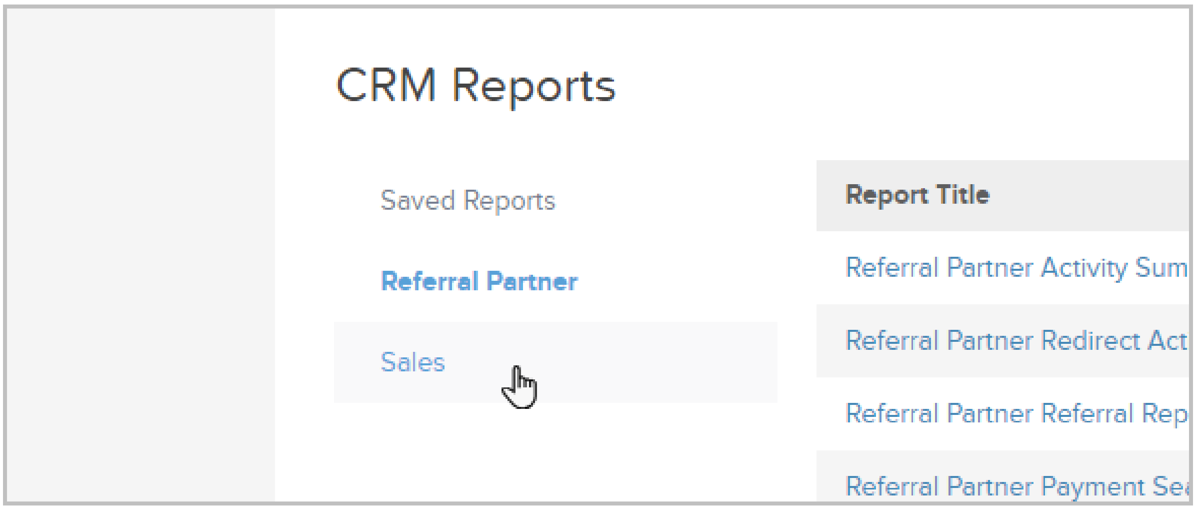
Call Log Report

The call log report produces a detailed list of note records that an Individual sales rep or a sales team has completed within a specific period of time. If you use this report, your reps should schedule calls by creating notes.

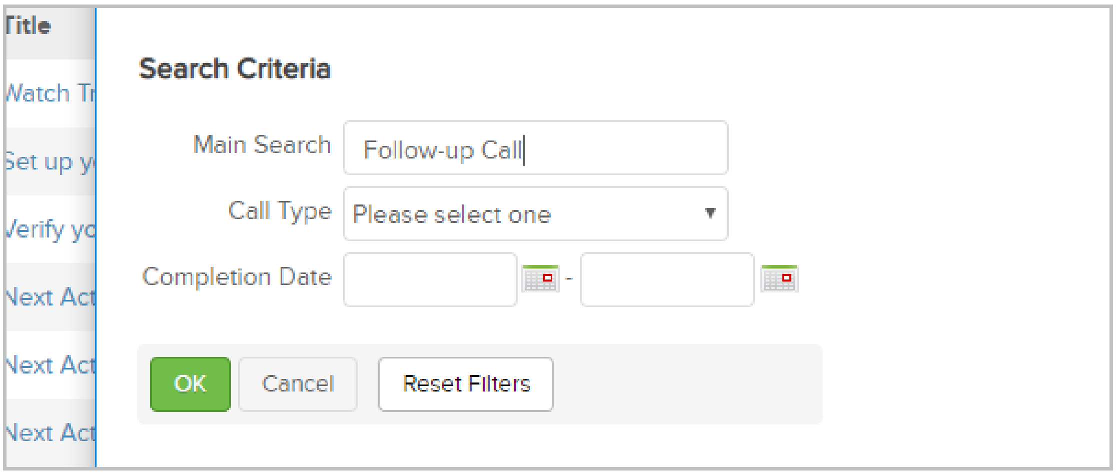
1. Go to **CRM** > **Reports** in the main navigation



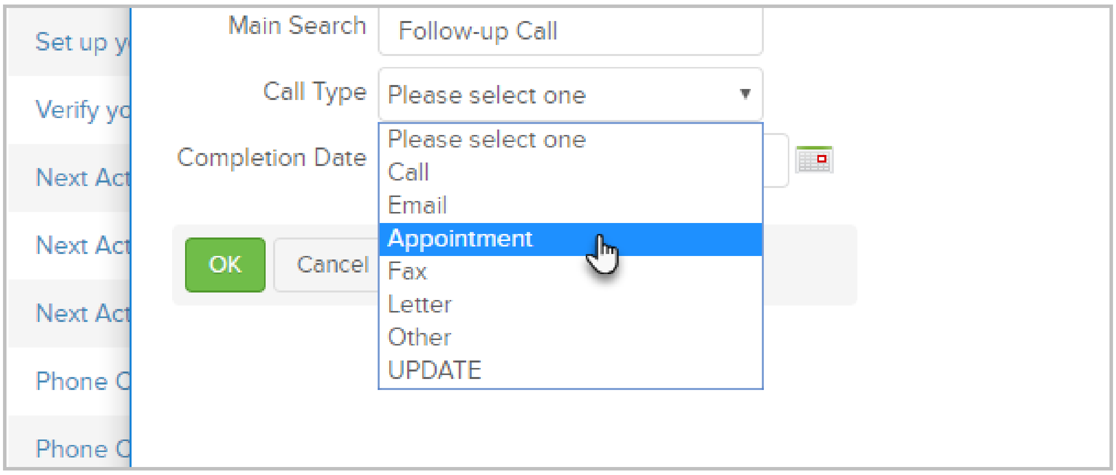
2. Click **Sales**



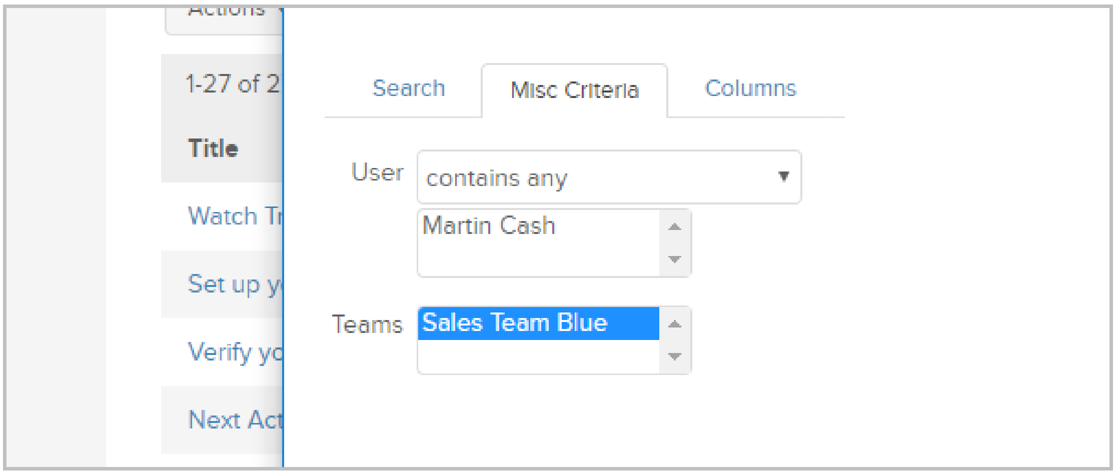
3. Click **Call Log Report**
4. You can filter the report by:
    1. Main Search is the title of the Note



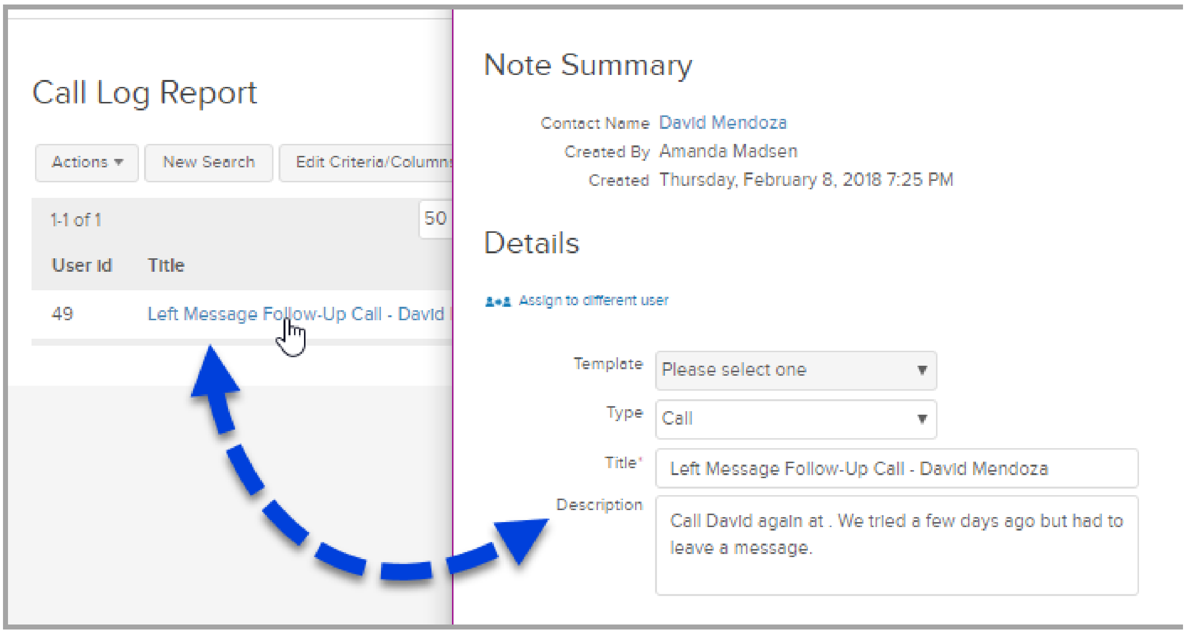
2. Call types. These are also referred to as “Action Type” in the search results. Call types are configured under **CRM > Settings > Tasks/Notes/Appointments**.



3. Completion date range
4. On the Misc Criteria tab, you can filter by a specific user or a team of users



5. The results displays links to the note records. This allows you to view the custom notes the sales rep entered when completing the note.



Call Log Report
Actions
New Search
Edit Criteria/Column
1-1 of 1
50
User Id
Title
49
Left Message Follow-Up Call - David
Note Summary
Contact Name David Mendoza
Created By Amanda Madsen
Created Thursday, February 8, 2018 7:25 PM
Details
Assign to different user
Template Please select one
Type Call
Title* Left Message Follow-Up Call - David Mendoza
Description Call David again at . We tried a few days ago but had to leave a message.