Track Sales Rep Activity

You can monitor day to day sales team activity through the Call History Summary or Call Log reports (**CRM** > **Reports** > **Sales**.)

Call History Summary

The call history summary report lists the number of phone call tasks that an individual sales rep or a sales team has completed within a specific period of time. You can use it to gauge sales team activity and / or evaluate sales rep call volume against a daily / weekly / monthly call metric. You can filter this report by sales rep name, completion date range, sales team, and more. Add the due date and completion date columns to the report to evaluate timeliness in addition to call volume. Note: If you use this report, your reps should schedule calls by creating tasks, in addition to using the next action date in the opportunity record.

Call Log Report

The call log report produces a detailed list of tasks that an individual sales rep or a sales team has completed within a specific period of time. This report includes all of the task types (i.e. call, email, appointment, etc.) and displays links to task records so you can view the custom notes the sales rep entered when completing the task. You can filter this search by action description, task type, completion date range, user and sales team.