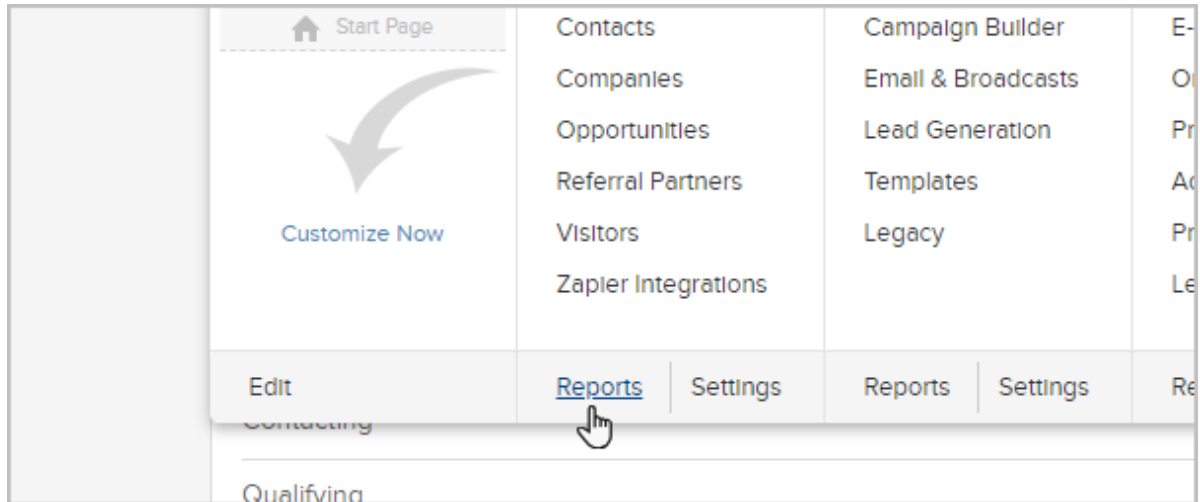


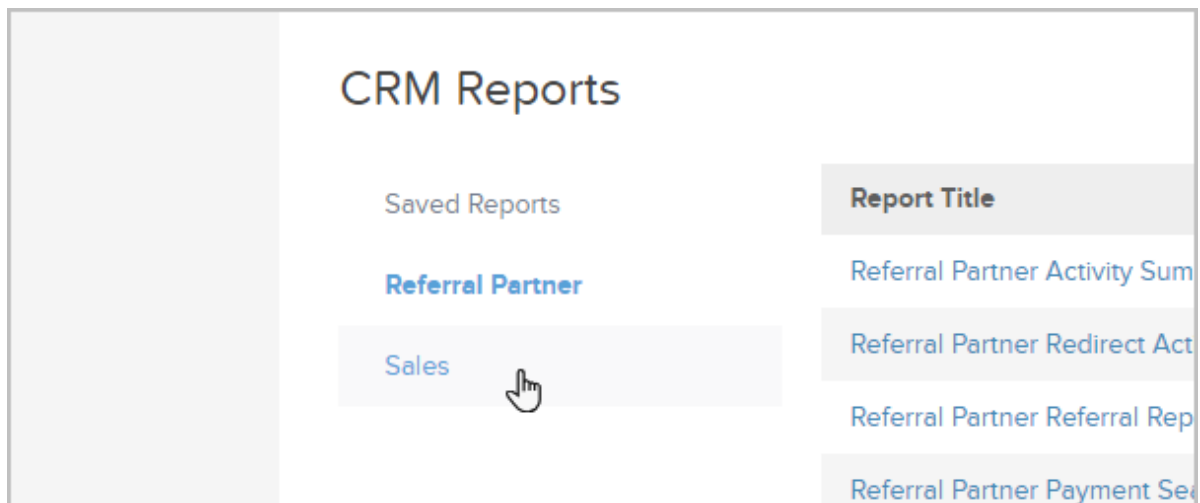
Call Log Report

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

Search Criteria

Main Search

Call Type

Completion Date -

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**.

Main Search

Call Type

Completion Date

- Please select one
- Call
- Email
- Appointment**
- Fax
- Letter
- Other
- UPDATE

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

Search **Misc Criteria** Columns

User

Teams


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/Columns

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 ▾
Type ▾
Title*
Description