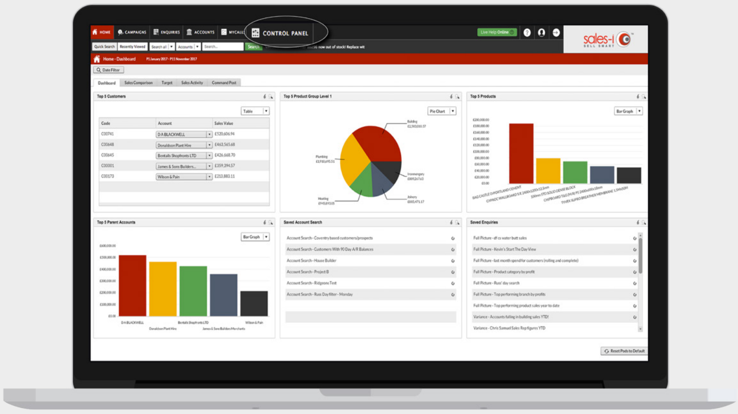
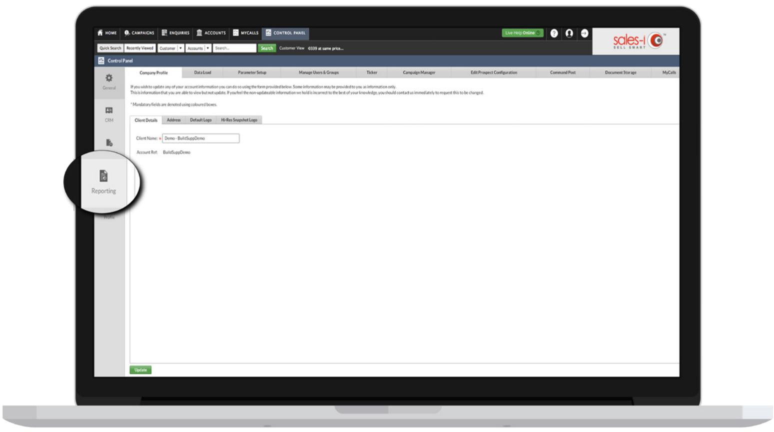
HOW TO CHECK THE PERFORMANCE OF YOUR SALES TEAM

This guide will show you how to prepare and export a (weekly) call report within sales-i, using various filters, such as; user, date ranges and types of call made.

01 Click **Control Panel** from the top black navigation bar.

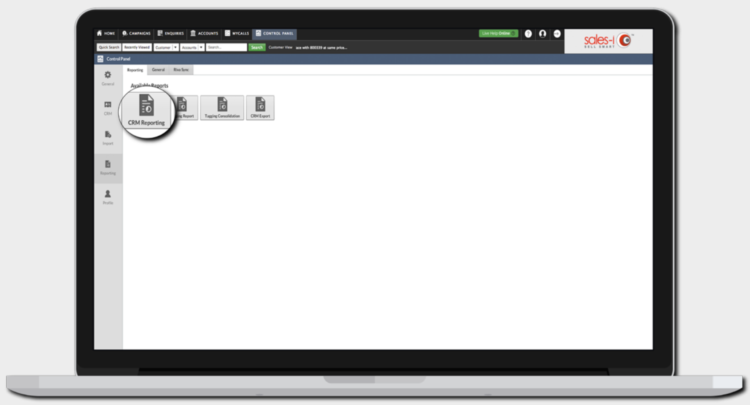


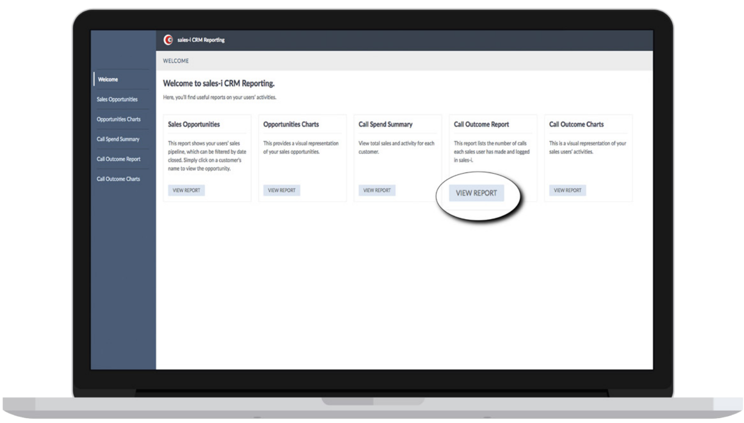


02 From the available options on the left hand side, click **Reporting***.

*Different user types will have different options within the control panel.

03 Click **CRM Reporting.**

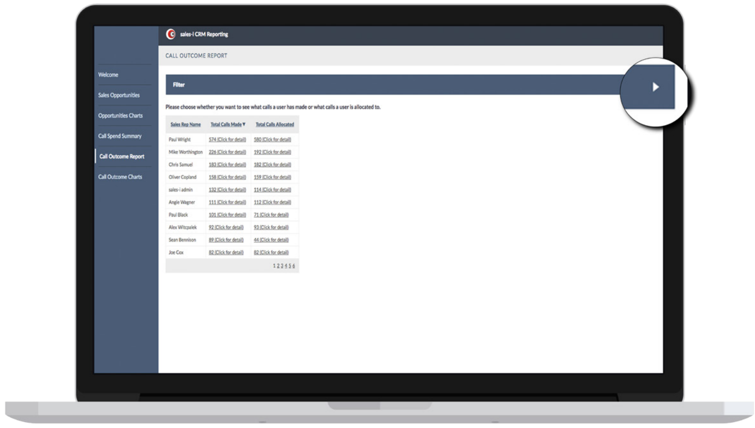


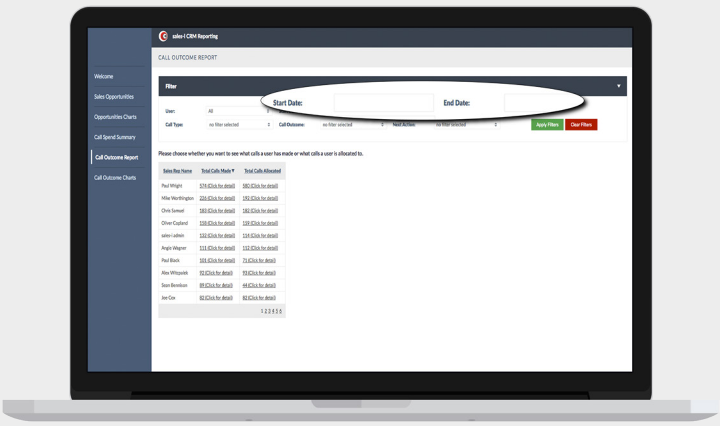


04 There are various reporting options available. Select the **VIEW REPORT** button under the **Call Outcome Report** option or via the left hand navigation.

05 Click the expand arrow on the right hand side to show filter options allowing you to customise your report*.

*Depending on your setup, you may see only your own details or multiple users.

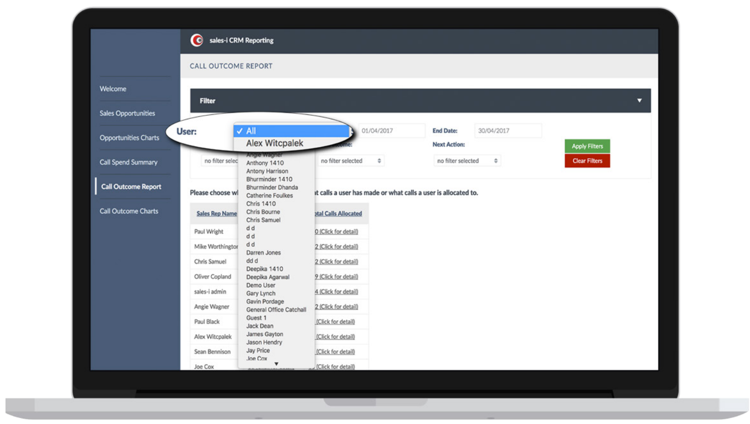


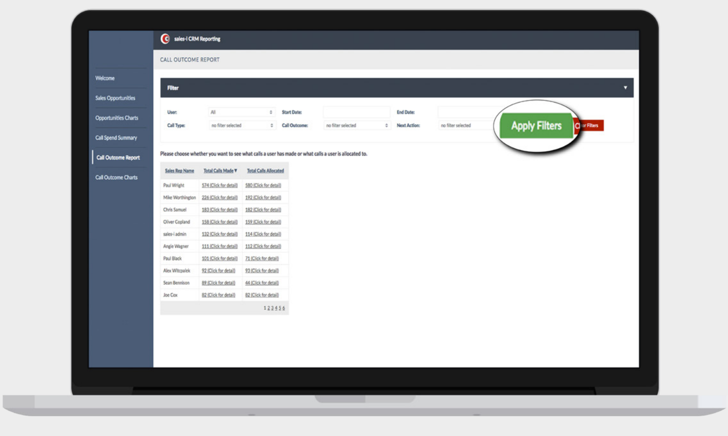


06 Select the **Start Date** and **End Date** that you wish to see data for.

07 You can filter by **User**, or simply leave the settings as default to view all users for your account.

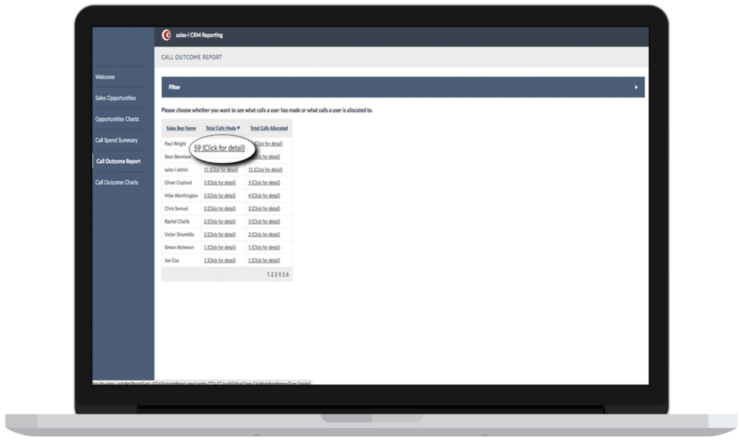
You can also change the Call Type, Call Outcome and Next Action to suit your needs.

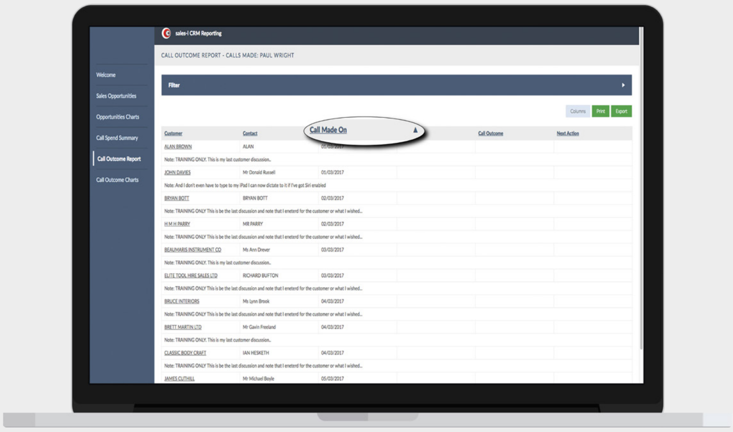




08 When you're done, click the green **Apply Filters** button.

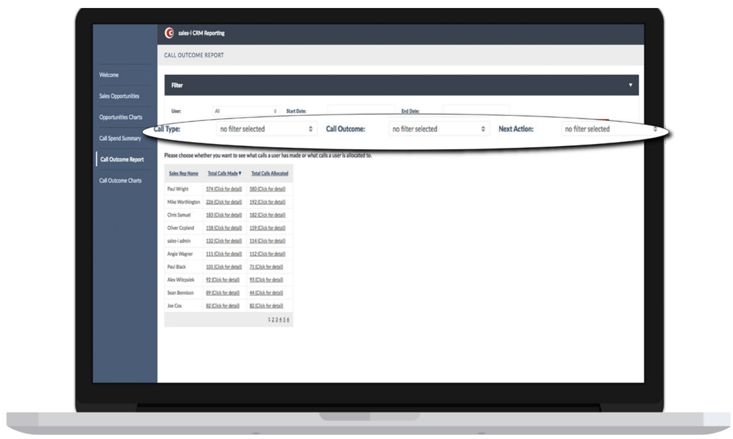
09 To view someone's historic activity, click the number under the **Total Calls Made** column.

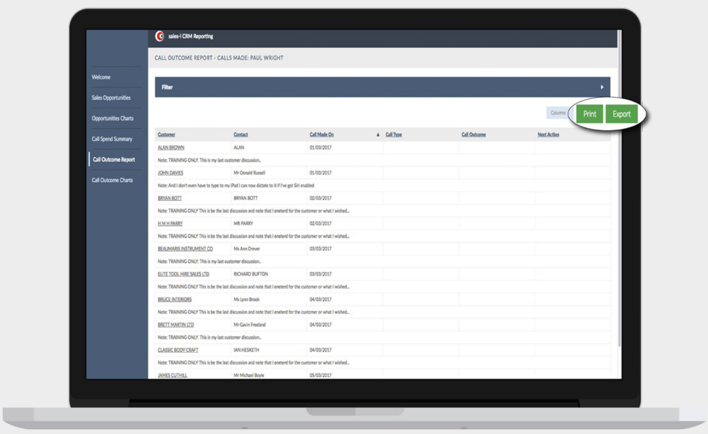




10 The results you'll see are ordered alphabetically. If you want to view them chronologically, select the column header **Call Made On** to rearrange them.

11 The grey **Columns** button will allow you to customise the report using options captured at note creation.





12 You can either **Export** the info into Excel or, alternatively, **Print** the document using the two green buttons in the top right hand corner.

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