Assign a call to a teammate and notify them

Purpose: Route work to the right person and create accountability.

Steps

1. Open the call.
2. Use the Assign To dropdown near the top right.
3. Choose the staff member.
4. Click Submit.
5. The assignee receives an email notification that the call has been assigned.

Tips and good practice

- Add a Staff Comment to give context when you assign a call.

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