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.

Revision #1
Created 18 September 2025 15:58:45 by Admin
Updated 18 September 2025 15:58:57 by Admin