Calling a customer from HQ

Call a customer from your company's number, so they see your HQ number and not your own cell.

Steps

1. Open the customer or the job and press Call from our number.
2. HQ calls your own phone first. Pick up, and HQ then calls the customer.
3. When you hang up, record what happened: Called them, Left a message or No answer.

Good to know

The call is logged on the Calls screen and on the customer.

If your company records calls, the customer hears the recording notice first.