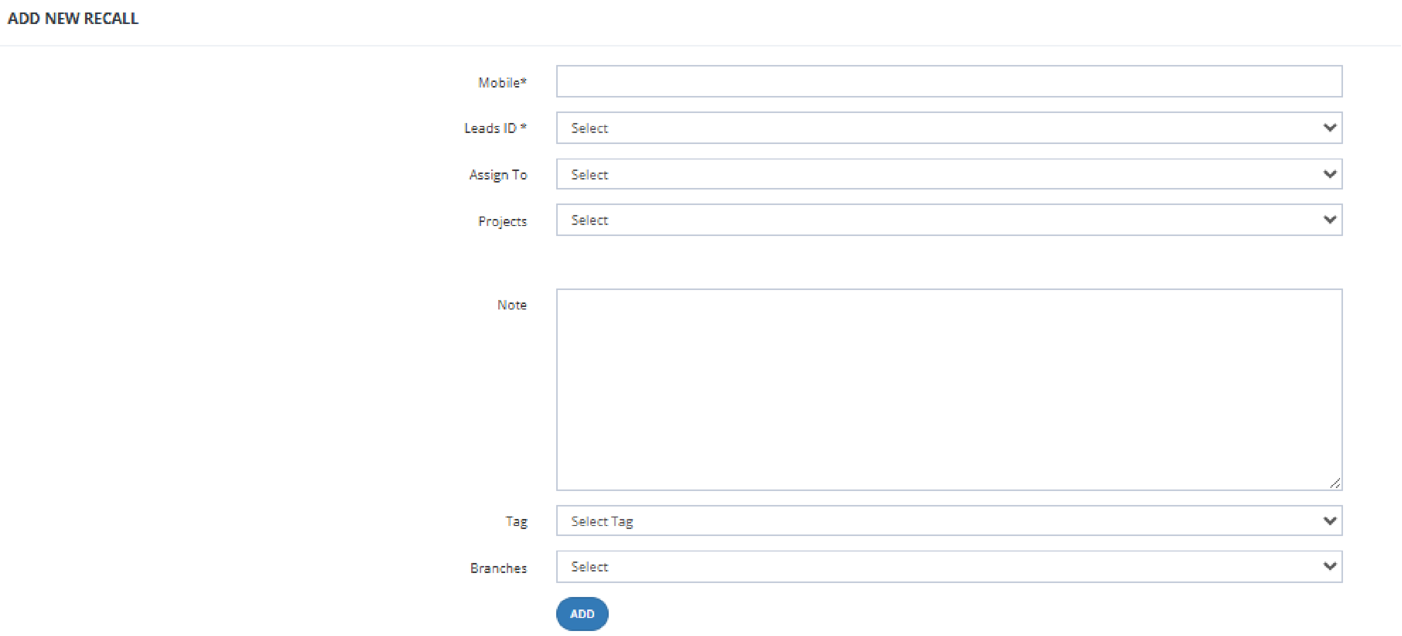
Recall

Overview

Use **Recall** when an existing lead in the system calls again — for example, about a different project or to follow up on something new.



How to Handle a Recall

1. Go to **Call Center → Recall**.
2. Enter the caller's **mobile number** in the search field.
3. The system searches for matching leads and displays them.
4. Select the correct lead from the results.
5. Update the following as needed:
   - **Lead ID (Marketing Info)** — change if the caller is now interested in a different campaign or source.
   - **Project** — select the project the caller is currently interested in.
   - **Assign** — reassign to a different salesman if needed.
6. Submit — the lead's information is updated and the assigned salesman can follow up.

Key Things to Know

- The mobile number search pulls up all existing leads matching that number.
- Updating the Lead ID changes the marketing source attached to the lead.
- The salesman assigned after a recall will see the updated lead in their **My Leads**.
- Use Recall instead of Add Lead to avoid creating duplicate entries for the same contact.

Created 2026-06-28 08:31:46 UTC by Admin
Updated 2026-06-28 08:32:14 UTC by Admin