Calling a Client

Tap to select a menu option

Access the Calling Feature:

- Select the ellipses (three dots) to bring up the calling feature.

Initiate the Call:

- Select "Call Client" to make a phone call.

Choose the Phone Number:

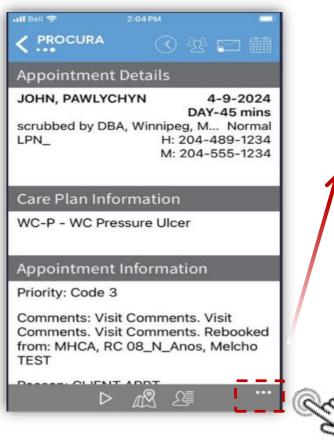- You will be prompted to select the phone number you wish to call.

Alternate Access:

- This feature is also available within the Client Details ellipses.