SimboConnect — Home Screen All Calls Worklist Dashboard

> This guide turns your video walkthrough into structured help content your customers can use. It covers how to open the **All Calls** dashboard, understand what you see, filter/search, create persistent dashboards, manage tasks, and take actions on calls.

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1) Overview: What the All Calls dashboard shows

The **All Calls** dashboard is your real-time work queue. It:

- Lists **all inbound and outbound calls**, grouped by **phone number** so related calls stay together.
- Surfaces the **primary reason** for each call (e.g., *Appointments*, *Refill*) alongside other metadata like **status** and **language**.
- Lets you **search** and **filter** the list, then **save** those filters as **persistent dashboards** (shown as top shortcut chips such as *Appointments*, *Refill*, or a teammate's name like *Veronica*).
- Enables **inline actions**: open the call, update status, create/complete tasks, assign, and more.

> **Why grouping matters:** Multiple calls from the same number are often related to the same person and task. Grouping helps you work the full context without losing history.

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2) Open the All Calls dashboard from the main screen

Follow the same entry path shown at the start of the video:

1. From the **Phone Copilot** home screen, open the left navigation.
2. Select **Calls** (or **Dashboard**, depending on your layout).
3. Choose **All Calls** to land on this screen.

> **Tip:** If your account uses custom wording, your entry may read *Calls → All Calls* or *Dashboard → Calls*. The video's intro demonstrates this exact click path.

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3) Anatomy of a call group (grouped by phone number)

Each entry represents a **call group** (all calls from the same number):

- **Header row:** Caller name/number, last activity time, and quick status pill.
- **Primary reason chip:** e.g., *Appointments*, *Refill*, etc.
- **Language tag:** The call's detected/selected language.
- **Counts/indicators:** Number of calls in the thread, unread/attention indicators.
- **Actions (hover or ⋯):** Open details, update status, assign, create task, etc.
- **Expand/collapse:** Click the row to expand the thread and see all related calls.

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4) Primary reason, status, language & other metadata

- **Primary Reason:** The top-level categorization SimboConnect assigns (or your team sets) to describe why the caller reached out.
- **Status:** Where this call thread stands in your workflow (e.g., *New*, *In Progress*, *Waiting*, *Done*). Click the **status pill** to update.
- **Language:** Indicates the language of the call. Filterable for routing multilingual workloads.
- **Other fields:** Time received, assignee, tags/labels, and counts may appear depending on your configuration.

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5) Search the calls list

Use the **Search** box at the top right:

1. Click the **Search** field.
2. Type a name, number, reason, note keyword, or status.
3. Press **Enter** to run the search.
4. Clear the query to return to the full list.

> **Tip:** Combine Search with Filters to narrow to a very specific working set.

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6) Filter the calls list

Open **Filter** (top right) to include/exclude by common fields:

1. Click **Filter**.
2. Choose conditions (e.g., *Primary reason = Appointments*, *Status = New*, *Language = Spanish*).
3. Apply to update the list.
4. (Optional) Click **Save as dashboard** to store this filter permanently (see next section).

> **Note:** The video shows creating these persistent views directly from the Filter panel.

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7) Create & use persistent dashboards (shortcut chips)

Persistent dashboards are saved filters that appear as **shortcut chips** at the top (e.g., *Appointments*, *Refill*, *Veronica*):

1. Set your filters (and search, if needed).
2. Click **Save as dashboard**.
3. Name it clearly (e.g., *Appointments*, *Refill*, or a teammate's name).
4. Your new dashboard appears as a **chip**. Click the chip anytime to re-apply the view.
5. Re-order or remove chips from the chip overflow/menu.

> **Team tip:** Create common dashboards for roles (Front Desk, Refill team) so everyone lands on a focused queue with one click.

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8) Work a call: open details, review notes/transcript, and navigate the call thread

1. Click a **call group** row to open the **Call Details** (drawer or page, depending on layout).
2. Review the **AI/agent notes**, **summary**, and any **transcript/recording** linked to the call.
3. Move through the **thread** (older/newer calls) to understand context.
4. Add a **note** or attach a **task** (see next section) as needed.
5. Update the **status** before closing the call details.

> **Goal:** Each time you open a call, either complete it or push it forward (assign, task, schedule, or request info) and reflect that in the status.

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9) Manage tasks from the dashboard

Tasks let you track follow-ups tied to a call/thread.

- **Create a task:** From the call row or details (via **Add Task** or **⋯**), enter a title, due date, and (optionally) assignee.
- **Complete a task:** Check it off from the call details or the row’s quick actions.
- **View task status:** Task indicators show whether a thread has open items.
- **Linking:** Tasks stay attached to the call group so future calls from the same number show relevant to-dos.

> **Tip:** Use concise task names (e.g., *Confirm 10/12 appt window*) so they read well in the row.

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10) Update call status (single & bulk)

- **Single:** Click the **status pill** on a row or in the details view and choose the next status.

- **Bulk:** Use **Select** (checkboxes) to pick multiple rows, then choose a **bulk action** (e.g., *Mark In Progress*, *Mark Done*).

> **Best practice:** Keep statuses truthful. If a task remains, avoid *Done*; choose *Waiting/In Progress* instead.

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11) Assign, mention teammates, and hand off work

- **Assign:** From the row (⋯) or details, choose **Assign** and pick a teammate or team queue.
- **Mentions:** In notes, type **@Name** to notify a teammate and add context.
- **Handoffs:** Combine *Assign* with a clear note and a task/due date when you need another person to take over.

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12) Quick actions from the row (? menu)

The **⋯ menu** on each call row provides shortcuts such as:

- **Open details**
- **Update status**
- **Assign**
- **Add note**
- **Create task**
- **Archive/resolve** (if enabled)

> Exact options vary by role and configuration. The video demonstrates clicking through these to work a call without leaving the list.

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13) Bulk select and bulk actions

1. Hover the list and **check** the rows you want to include.
2. Use the **bulk bar** at the top/bottom to apply actions (e.g., *Status*, *Assign*, *Archive*).
3. Confirm to apply changes to all selected threads.

14) Sort and time range controls

- **Sort:** Choose newest first, oldest first, or by status/priority (depending on configuration).
- **Time range:** Narrow the view to today, last 7 days, or a custom date range to focus work.

15) Filter by language and reason (operations views)

To route specific workloads:

- **Language routing:** Filter **Language = [Your target]** to staff bilingual agents.
- **Reason routing:** Filter **Primary reason** (e.g., *Appointments*, *Refill*) for specialized teams.

Save each as a persistent dashboard for one-click access.

16) Create an “Appointments” view (example)

1. Click **Filter**.
2. Set **Primary reason = Appointments**.
3. (Optional) Add **Status = New** and a **Time range**.
4. Apply, then **Save as dashboard** and name it **Appointments**.
5. Use the **Appointments** chip to work these calls quickly.

17) Create a “Refill” view (example)

1. Click **Filter**.
2. Set **Primary reason = Refill**.
3. (Optional) Add **Language** or **Assignee**.
4. Apply, then **Save as dashboard** and name it **Refill**.

18) Create a teammate-specific view (example: Veronica)

1. Click **Filter**.
2. Set **Assignee = Veronica** (or filter by *Created by*/*Team* as needed).
3. Apply, then **Save as dashboard** and name it **Veronica**.
4. Click the **Veronica** chip anytime to review just that teammate's workload.

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19) Save, rename, and share a persistent dashboard

- **Save:** From the Filter panel, choose **Save as dashboard**.
- **Rename:** Open the chip's menu (⋯) → **Rename**.
- **Share:** Toggle **Share with team** (if available) so others see the chip.
- **Reorder/Pin:** Drag to reorder chips or pin favorites to the visible row.

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