

Navigate the Call Details screen

Purpose: Help staff understand the three-panel Call Details screen and where to find common actions.

Steps

1. Open a call in Phone Copilot.
2. Look at the three columns on the screen.
 - Left: history for this caller.
 - Middle: full call transcript with play buttons.
 - Right: AI summary, requests, and patient info.
3. Use the top bar to see Caller ID and quick actions like Block, I am Working on it, and Mark as Resolved.

What you will see on this page

- A vertical list of calls and SMS for this phone number on the left.
- Transcript bubbles in the center with small play icons on each line.
- An audio player for the full recording at the bottom.
- A summary panel on the right with sections such as PII Data, Open Message for Office, Request blocks, and Patient Info.

Tips and good practice

- Use the summary on the right first to understand the call in seconds.
- Use the center panel only if you need exact wording or to verify a detail.

Revision #1

Created 19 September 2025 18:55:28 by Admin

Updated 19 September 2025 18:55:49 by Admin