

SimboDIYAS — 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.

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.

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.

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.

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.

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.

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.

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

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.

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.

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.

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.

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.

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**.
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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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