View caller history and past SMS

Purpose: See previous calls and text conversations from the same phone number.

Steps

1. Open a call.
2. In the left panel, scroll through the list to see time, status, and reason for each past interaction.
3. Select any item to open it.
4. Items labeled Open or Resolved show call records. Items labeled with a chat icon show SMS threads.

What you will see on this page

- Timestamps with badges like Open, Resolved, Need Refill, Need Appointment.
- Both calls and text messages for the same caller.

Tips and good practice

- Use the history to avoid asking the patient to repeat information.
- Check if a similar request was already resolved before creating a new task.

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