

SimboVara Workflow Customization: Set the Referral Transfer Number - Admin Panel

Purpose

Route referral-related calls to a special number for faster handling.

Behavior

- If this number is set and your workflow calls for referral transfer, Copilot transfers immediately.
- If blank, Copilot records the referral details and posts a message on your dashboard for follow up.

Steps

1. In **Workflow Customizations**, locate **Referral Transfer Phone Number**.
2. Enter the destination number.
 - Example entry: (617) 334-2617
3. Click **Save**.

Tips and good practices

- Point this to your referrals team line.
- Include clear conditions in your **Appointment** or **Medical Records** workflows that say when to transfer for referrals.
- Test after saving.

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