SimboVara Workflow Customizations: Overview and Navigation - Admin Panel

Purpose

Help administrators understand where to configure how Phone Copilot interacts with callers and how each section on the page fits together.

Navigation

Admin menu → Copilot Settings → **Workflow Customization**

What you can configure on this page

- Knowledge sources that Copilot can read from using **Website URLs**.
- Call handling targets using **Front Desk Transfer Number** and **Referral Transfer Number**.
- Global behavior with **Multiple Language Initial IVR**, **After Hours On-call Workflows**, **Verify Date of Birth**, and **Transfer Timeout**.
- Practice information used to answer caller questions using **Office Location Details** and **Office Hours Details**.
- Conversation flows by use case using these editable sections:
  - **Refill Workflow Questions**
  - **Medical Records Workflow Questions**
  - **Appointment Workflow Questions**
  - **Appointment Rescheduling Workflow Questions**
  - **Appointment Cancellation Workflow Questions**
  - **Talk to Clinician Workflow Questions**

Save behavior

Changes take effect as soon as you save the page.

Tips and Good practices

- Make one change at a time and place a quick test call after each save.
- Keep transfer numbers current. If a number is blank, Copilot will not transfer for that case.
- Store complex rules in plain English in the workflow boxes. Copilot understands them without special syntax.

Revision #4
Created 18 September 2025 04:30:50 by Admin
Updated 25 September 2025 19:23:20 by Admin