

# Conversations Feature Configuration Guide

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## Key configuration options | Example | Best practices

The **Conversation** module serves as a centralized hub to monitor, filter, and manage all patient interactions and automated chat workflows handled by FrontOffice+. It gives practice staff complete visibility into incoming messages, appointment statuses, and chat histories.

## Key configuration options

### Advanced filtering and search

Locate specific patient interactions using flexible viewing and search options:

- **Timeframe navigation:** Switch between **Day**, **Week**, or **Month** views to review recent or historical activity.
- **Category filters:** Filter conversation lists using toggle icons for calls, text interactions, waitlist entries, AI activity, or specific provider calendars from the **All calendars** dropdown.
- **Real-time search:** Use the search bar to filter patient records by last name, phone number, message body content, or conversation outcome (for example, prospect).

### Conversation audit and history view

Select any row from the **All Conversations** list to inspect the complete conversation thread:

- **Transcript log:** View time-stamped incoming patient replies and FrontOffice+'s automated responses in chronological order.
- **Attendee details:** View associated phone numbers, patient names (using the **Show Names** option), and the date and hour of the latest interaction.

## Example

- **Scenario:** A new patient contacts the clinic via SMS, and FrontOffice+ prompts them for identity validation details.
- **Action:** Staff members search for the patient's phone number in the search bar to bring up the conversation.
- **Outcome:** Staff can review FrontOffice+'s initial automated welcome text and validation prompt to manage proper follow-ups.

## Best practices

Confirm:

- **Filter use:** Use calendar and category filters regularly to audit unhandled or high-priority patient communications.



If you require further assistance, contact our Customer Support team via in-app chat, email us at [support@drchrono.com](mailto:support@drchrono.com), or call us at (844) 569-8628.