**CEP - Prodoc AI Saas**

**Introduction:**

The Prodoc AI Hospital Tool is an all-in-one platform that helps hospitals manage patient interactions, tasks, and campaigns. It supports WhatsApp bots, voice calls, and web bots to automate communication and improve engagement. Hospitals can also send health reminders, track analytics, and streamline daily operations from a single dashboard.

**Sections available:**

* Dashboard
* Conversations
* Leads
* Task Management
* Appointments
* Contacts
* Agent Assist
* Promotions
* Care Journeys
* Commerce
* Field force
* Settings
* Help

Dashboard:

The **Dashboard** offers a centralized view to monitor how the platform is performing across different channels. It provides real-time and historical insights into patient interactions and overall engagement through conversations, leads, calls, and campaigns.

### Overview

The Voice Analytics and Call Analytics dashboard provides a comprehensive overview of call center data, enabling users to monitor and analyze key performance indicators (KPIs) and trends. The dashboard is divided into several sections, each providing insights into different aspects of call center operations.

### Sections

#### 1. \*\*Overview\*\*

\* \*\*Total Calls\*\*: Displays the total number of calls received, with an upward arrow indicating an increase compared to the previous week.

\* \*\*Success Rate\*\*: Displays the percentage of successful calls, with a downward arrow indicating a decrease compared to the previous week.

\* \*\*Avg Duration\*\*: Displays the average duration of calls, with an upward arrow indicating an increase compared to the previous week.

\* \*\*Prev week\*\*: Provides a comparison to the previous week's data.

#### 2. \*\*Patient Sentiment\*\*

\* \*\*Voice Intelligence Analysis\*\*: Displays the sentiment analysis of patient calls, categorized into \*\*Positive\*\*, \*\*Negative\*\*, and \*\*Neutral\*\*.

\* \*\*Percentage\*\*: Displays the percentage of each sentiment category.

#### 3. \*\*Call Volume Trends\*\*

\* \*\*Weekly Call Volume Trend\*\*: Displays a line graph showing the weekly call volume trend over a specified period.

\* \*\*Call Volume by Hour\*\*: Displays a bar chart showing the daily call distribution across business hours.

#### 4. \*\*Performance Trends\*\*

\* \*\*Appointments and Sentiment Trends per Day\*\*: Displays a line graph showing the appointment and sentiment trends over a specified period.

\* \*\*Appointments\*\*: Displays the number of appointments scheduled.

\* \*\*Positive\*\*, \*\*Negative\*\*, and \*\*Neutral\*\*: Displays the sentiment categories.

\*\*Call Analytics Page\*\*

### Description

The Call Analytics page provides a detailed analysis of call center data, enabling users to monitor and analyze key performance indicators (KPIs) and trends. The page is divided into several sections, each providing insights into different aspects of call center operations.

### Call Analytics

#### 1. \*\*Call Summary\*\*

\* \*\*Total Calls\*\*: Displays the total number of calls received.

\* \*\*Success Rate\*\*: Displays the percentage of successful calls.

\* \*\*Avg Duration\*\*: Displays the average duration of calls.

\* \*\*Call Volume by Hour\*\*: Displays a bar chart showing the daily call distribution across business hours.

#### 2. \*\*Call Types\*\*

\* \*\*Inbound Calls\*\*: Displays the number of inbound calls received.

\* \*\*Outbound Calls\*\*: Displays the number of outbound calls made.

\* \*\*Abandoned Calls\*\*: Displays the number of abandoned calls.

\* \*\*Call Types Breakdown\*\*: Displays a pie chart showing the breakdown of call types.

#### 3. \*\*Call Distribution\*\*

\* \*\*Inbound Call Types\*\*: Displays a bar chart showing the distribution of inbound call types.

\* \*\*Outbound Call Types\*\*: Displays a bar chart showing the distribution of outbound call types.

\* \*\*Call Volume by Day\*\*: Displays a line graph showing the call volume trend over a specified period.

#### 4. \*\*Peak Hours Analysis\*\*

\* \*\*Call Volume by Hour\*\*: Displays a bar chart showing the call volume trend by hour.

\* \*\*Peak Hours\*\*: Displays the peak hours of the day.

\* \*\*Quiet Hours\*\*: Displays the quiet hours of the day.

#### 5. \*\*Call Performance\*\*

\* \*\*Inbound vs Outbound Calls\*\*: Displays a line graph showing the comparison of inbound and outbound calls over a specified period.

\* \*\*Call Success Rate\*\*: Displays the success rate of calls.

\* \*\*Call Abandon Rate\*\*: Displays the abandon rate of calls.  
  
Tasks Page

The Tasks page provides a comprehensive overview of tasks assigned to agents, enabling users to monitor and analyze task completion rates, task types, and agent performance.

Sections

1. Overview

Total Tasks: Displays the total number of tasks assigned to agents.

Total Completed Tasks: Displays the total number of completed tasks.

Total Pending Tasks: Displays the total number of pending tasks.

2. Task Types

Task Types Breakdown: Displays a pie chart showing the breakdown of task types.

Reminder Tasks: Displays the number of reminder tasks.

Callback Tasks: Displays the number of callback tasks.

Follow-up Tasks: Displays the number of follow-up tasks.

Campaign Tasks : Display the number of Campaign tasks.

3. Priority Distribution

Critical Priority - total number of critical priority tasks.

High Priority - total number of high priority tasks.

Medium Priority - total number of medium tasks.

Low Priority - total number of low priority tasks.

Lowest Priority - total number lowest priority tasks.

4.Peak Task Hours

Hourly task creation patterns

shows the distribution of task throughout the day per hours

5.Task Creation vs Completion

Daily task flow

number of tasks created and completed per day (blue- created , green - completed)

6.Task Status Distribution

Current task breakdown by status

a pie chart of field having pending , planned ,rescheduled and completed tasks

7.

Task Type Performance Details

Comprehensive breakdown of task types with metrics

reminder ,callback ,campaign ,followup on the given fields

total tasks of that field

Completion Rate

AI Interaction

**Agents**

\*\*Overall Voice\*\*

Active Agents : total no. of active agents

\* \*\*Avg Sentiment\*\*: 3/5.0, indicating a neutral customer satisfaction level.

\* \*\*Avg Handle Time\*\*: 1:00, representing the average time spent on each call.

\*\*Call Analytics\*\*

\* \*\*Tasks\*\*: A list of tasks assigned to agents, with 30 tasks currently available.

\* \*\*Active Agents\*\*: A list of agents currently handling calls, with a total of 6 active agents.

\* \*\*Agent Performance Leaderboard\*\*: A ranking of agents based on their performance metrics.

\*\*Individual Agent Metrics\*\*

\* \*\*Agent Calls\*\*: A list of agents, with their corresponding call volumes:

1. \*\*Agent 1\*\*: X calls, with X% positive, X% neutral, and X% negative sentiment.

2. \*\*Agent 2\*\*: X calls, with X% positive, X% neutral, and X% negative sentiment.

3. \*\*Agent 3\*\*: X calls, with X% positive, X% neutral, and X% negative sentiment.

4. \*\*Agent 4\*\*: X calls, with X% positive, X% neutral, and X% negative sentiment.

5. \*\*Agent 5\*\*: X calls, with X% positive, X% neutral, and X% negative sentiment.

6. \*\*Agent 6\*\*: X calls, with X% positive, X% neutral, and X% negative sentiment.

\*\*Agent Call Volume Comparison\*\*

\* A bar chart comparing the call volumes of individual agents, with shows which agents have the highest call volumes.

At the top of the dashboard, we get a quick view of:

* Today’s Conversations
* Conversations in the Last 7 Days
* Conversations in the Last 30 Days

These metrics cover all patient interactions happening through:

* WhatsApp Chats
* Voice Calls
* Web Bot Chats

Graph Sections:

1. Conversations Over Time

* Tracks the number of conversations taking place across different channels.
* Channels : WhatsApp, Voice Calls , and Web Bots.

2. Leads Generated

* Displays the number of leads (potential patients shown interest) acquired via each channel.

3. Promotions & Campaigns Sent

* Shows how many promotions were triggered during the selected time range.

4. Conversions

* represents the number of successful outcomes like appointments booked or referrals (by partner) made.

Voice-Specific Insights :

This section of the dashboard shows a calls focused analytics view .

* Incoming & Outgoing Call Metrics
* We have two charts showing 1) Date wise Distribution (trends over time) 2) Tag wise distribution(Calls are categorized by purpose for better understanding the requirements of patient over time)

\*You can customize the time period in all these plots using the date picker\*

We have a search bar to easily switch to sections , notifications (to check for any ) , profile .

Conversations:

The **Conversations** section provides a centralized interface for managing and reviewing all communication with patients or customers across multiple channels. It is divided into three main sub-sections:

1. WhatsApp Conversations:

* This section displays the entire history of WhatsApp chats with users.

### Features:

* Chats List View**:** Shows a list of all contacts with whom WhatsApp conversations have occurred.
* Chat History**:** Selecting a contact displays the full conversation made on the whatsapp.
* Contact Details**:**
  + Displays user details such as name, phone number, registration time, and any additional tags (e.g., health issues).
* Active Sessions**:**
  + Shows current session types (e.g., SERVICE, MARKETING).
  + Indicates whether the session is active or has ended.(session ends after 24hrs of the starting time.)
* Chat Summary Generator**:**
  + Allows quick generation of a summary of recent conversations to avoid reading entire threads.
* Filters**:**
  + Filter chats by status such as Active, Inactive, All chats.

1. Voice Call Conversations :

* This section provides all **voice call interactions**, both incoming and outgoing, with metadata.

### Features:

* Tabular View of Calls:
  + Columns with name, phone number, call direction (Incoming/Outgoing), status (Completed), and time.
* Call Search:
  + Search calls by name/phone and by specific date ranges.
* View & Listen:
  + Clicking on "View" allows you to access metadata and listen to the recorded call.

1. Web Bot Conversations :

* This section provides all interactions between users and chatbots on the platform.

### Features:

* Chat History: Displays the full history of bot conversations for each user.
* Contacts : Similar to WhatsApp, showing the user contacts.
* Contact Details**:**
  + Displays user details such as name, phone number, registration time, and any additional tags (e.g., health issues).
* Chat Summary Option: gives a quick overview of the chat without reading the entire chat.

Leads:

The Leads Section helps hospitals manage all patient inquiries and interests across different channels like WhatsApp, Voice Calls, and Web Bots. Each lead represents a person who has interacted with the system and may need further assistance, follow-up, or conversion.

The Leads Section is organized into **three channel specific tabs** for better clarity and analysis:

1. WhatsApp Leads
2. Voice Call Leads
3. Web Bot Leads

Each tab contains similar functionalities, with data and actions relevant to that specific source of interaction.

### WhatsApp Leads Table :

This is the default view under the Leads section and shows all incoming leads via WhatsApp. The table includes the following columns:

* Name
* Phone
* Date: Date and time when the lead was created
* Lead Priority (Low / Medium / High)
* Engagement Reply
* Promotion
* Lead Source
* Lead Manager
* Chat Summary
* Conversation (view convo)
* Action To Be Taken
* Sentiment
* Disposition (action to follow)
* Comments
* Dates
* Telecaller Team Comments (who outreach their remarks)
* Actions

Each row represents a unique lead, sorted from the **latest to oldest** interaction.

Lead Age Highlighting

Leads are color-coded based on how long ago they were created:

* **0–80 minutes** – Green (fresh leads)
* **80–120 minutes** – Yellow (medium age)
* **120–180+ minutes** – Red (older leads)

This visual cue helps telecaller teams prioritize their outreach.

### Filters & Search Options

You can refine the leads shown using various filters:

* Search by Name / Phone Number
* Set Time Interval
* Disposition Filter
* Broadcast Selection
* Lead Manager Filter
* Lead Source Filter
* Lead Priority Filter

Actions Available per Lead

Each lead row includes a set of actions you can take:

1. View Lead Details – Opens a detailed profile of the lead.
2. Edit Lead Info – update custom fields
3. Add Status Update – update Lead status

A task is automatically generated to ensure follow-up is not missed.

### Lead Details Page

Clicking “View Lead” under actions shows complete information:

* Name, Phone
* Lead Manager
* Lead Priority & Status
* Sentiment
* Chat Summary
* Tags
* Lead Source
* Created At
* Health Issues (if any)
* Custom Fields
* Tasks

Each lead has a **timeline view** and relevant context to help staff follow up effectively.

Exporting WhatsApp Leads

You can **export** WhatsApp leads by making the system forward details of the leads from selected interval and selected filter to your email

This is useful for hospitals running **campaigns** or analyzing **patient engagement trends**.

2. Voice Leads

This section focuses on leads generated through Interactive Voice Response calls .

The table includes the following columns:

* Name
* Phone
* Direction
* Source
* Call Duration
* Call Date
* Priority
* Summary
* Action To Be Taken
* Sentiment
* Disposition (action to follow)
* Comments
* Actions

Each row represents a unique lead, sorted from the **latest to oldest** interaction.

### Filtering & Exporting

You can apply filters for:

* Disposition
* Interval Period
* Lead Source
* Name / phone

Export Option : You can export voice leads data to your email.

### Actions Available

Same actions as WhatsApp Leads:

* View Lead Details
* Edit Lead
* Add Lead Status Update

## 3. Web Bot Leads

This section handles leads generated through chatbots on websites .The table

includes the following columns:

* Name
* Phone
* Date: Date and time when the lead was created
* Lead Priority (Low / Medium / High)
* Promotion
* Lead Source
* Lead Manager
* Chat Summary
* Conversation (view convo)
* Action To Be Taken
* Sentiment
* Disposition (action to follow)
* Comments
* Dates (custom fields)
* Telecaller Team Comments (who outreach their remarks)
* Actions

### Filtering & Exporting

You can filter by:

* Disposition
* Interval Period
* Lead Manager
* Priority

Export Option : Just like the other sections, web bot leads can be exported via email.

Actions Available

Same set of actions:

* View Lead Details
* Edit Lead
* Add Lead Status Update

Task Management :

The Task Management section is where hospital staff can track, manage, and analyze all

their tasks in one place.

This section is divided into three key parts:

### Tasks

This is the central hub for all tasks – both manually created and AI-generated. Here's what you can do:

#### Task Overview

At the top, you'll find a quick stats summary:

* Total Tasks
* Today's Tasks
* Completed Today
* Delayed Tasks

#### Task Table

Tasks are displayed in a clean, easy-to-read table — sorted from latest to oldest. Each task includes details such as:

* Title
* Description
* Type (e.g., Follow-up, Reminder)
* Lead Name & Contact
* Assigned To (the employee handling it)
* Start / End Date
* Status (e.g., Pending, Completed)
* Created By (AI or manual)
* Outcome
* Priority
* Options – Actions you can take on a task (View, Make Call, Edit, Delete)

#### Filters

You can filter by:

* Priority
* Status
* Type
* Created By (AI or Manual)
* Assigned To
* Interval (date range)

#### Creating Tasks

You can:

* Add a Single Task manually
* Bulk Add Tasks if you need to create multiple entries at once
* Export Task Data to download the full list as a file — useful for reporting or offline access

2. AI Tasks

This section showcases AI-generated tasks — created automatically after the system analyzes chats or interactions with leads.

Just like the main Tasks tab, these are listed in a table (latest first), and can be filtered by:

* Priority
* Status
* Type
* Interval

AI Tasks help reduce manual workload by suggesting follow-ups or actions based on patient conversations and engagement patterns.

3. Analytics

The Analytics tab provides a visual breakdown of your task data to help you quickly understand performance.

#### Charts & Visuals

* Pie charts and graphs to visualize:
  + Task distribution by Type,Priority,Status
  + Today's Total Tasks
  + All Time Total Tasks

These visual aids help hospitals spot patterns, manage loads efficiently, and make data-driven decisions.

Appointments:

The Appointments section allows hospitals to track, manage, and schedule patient appointments — whether they’re manually created or automatically by the AI.

### Appointment Overview

All appointments — past and upcoming — are displayed in a **table format**, sorted for easy access. Whether created manually or auto-generated by the AI, each appointment can be filtered, searched, and managed in a few clicks.

### Key Features

#### Create Appointment

* You can manually create a new appointment by clicking the “Create Appointment” button.
* Appointments can also be generated by AI based on patient interactions and lead engagement.

#### Search & Filter

Quickly find appointments by:

* Name or Phone Number
* Appointment Date
* user

#### Appointment Status Tabs

Easily filter appointments by their current status using these tabs:

* New
* Ongoing
* Completed
* Cancelled
* Delayed
* All

#### Refresh

A Refresh button is available to reload the appointments list with the most up-to-date information.

#### Download Appointment List

Just click the Export/Download button to save the full list for offline access.

### **Appointment Table**

Each row in the table represents a scheduled appointment and includes the following columns:

|  |  |
| --- | --- |
| Column | Description |
| Name | Patient's name |
| Phone Number | Contact number of the patient |
| Appointment Date | Scheduled date and time of the appointment |
| Appointment With | Name of the doctor/staff assigned |
| Appointment Type | Type of appointment (e.g., Follow-up, Checkup) |
| Actions | Edit option to modify appointment details |

From the Actions column, you can quickly:

* Edit an appointment in case of changes in time, doctor, or type.

Contacts:

The Contacts section serves as the central address book for the hospital — housing all patients and lead contact details in one place. Whether you're importing large datasets or managing individual contacts, this section makes it easy to stay organized and connected.

This section provides a full **table view** of all contacts — making it easy to scroll, search, and manage records at scale. It’s built for speed and simplicity so teams can act fast without losing focus.

#### **Add Contacts**

* **Add Single Contact**Manually enter a new contact’s details using a simple form.
* **Bulk Add Contacts**Upload and import a large list of contacts in one go — perfect for onboarding patients or leads from other systems or campaigns.

#### **Filter Contacts**

* Use the **“Filter by List”** dropdown to segment contacts based on specific lists or tags (e.g., campaign-based, follow-ups, etc.).
* Click **“Show More Filters”** to access additional filter options — helping you narrow down exactly the group of contacts you need.

#### **Download Contacts List**

Just click the **Download** button to export the full contact list in a file format.

Promotions:

The Promotions module in Prodoc AI empowers hospitals to send personalized, large-scale communication campaigns via WhatsApp and Voice Calls. Whether it’s a health reminder, a new offering, or re-engaging with inactive leads — this section makes it seamless to manage everything from templates to analytics.

### **WhatsApp Promotions**

* The WhatsApp promotions section has **four main sub-sections** to help you **create, send, track, and optimize campaigns** effectively.

**1. Templates**

Create and manage promotional message templates for WhatsApp broadcasts.

**Key features:**

* View all existing templates in a searchable table
* Actions: Preview, Edit, Copy, Delete
* Easily create a new template from scratch using the “Add new Template” button
* Templates are reusable and can be attached to future broadcasts

#### **2. Schedule Promotions**

Plan your WhatsApp campaigns with precision.

**How it works:**

* View a table of all previously scheduled broadcasts
* Create a new broadcast by:
  + Giving it a name
  + Selecting a template
  + Choosing target contacts
  + Setting a scheduled time

**Actions:** You can delete existing scheduled broadcasts if needed.

#### **3. Analytics**

Track the performance of each WhatsApp broadcast with detailed delivery insights.

**Each broadcast includes:**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Si. No** | **Broadcast Name** | **Total Contacts** | **Sent** | **Delivered** | **Read** | **Replied** | **Failed** | **Report** |

#### **4. Re-Engagement**

This feature helps you **continue the conversation** with users who engage with your original broadcast.

**Key features:**

* Create Re-engagement templates for follow-up messaging
* View and manage all existing re-engagement templates in a table
* Use these templates to automatically respond when someone replies to a campaign/promotion

Agent Assist :

The **Agent Assist** module is designed to help hospital teams **identify and support patients with specific health concerns** by surfacing important conversations across WhatsApp and Web Bots. It intelligently monitors interactions using pre-defined **keywords**, bringing attention to chats where **potential diagnoses, concerns, or follow-ups** may be needed.

Agent Assist includes three key sections:

* **WhatsApp Assist**
* **Web Bot Assist**
* **Q&A Dashboard**

### 1. WhatsApp Assist

This section helps agents review patient conversations on WhatsApp where specific medical or concern-related keywords have been triggered.

#### How It Works:

* During conversations, if patients use keywords (e.g., "diabetes", "pain", "appointment"), the system flags the chat.
* These flagged chats appear here in a chat list view, allowing agents to take timely action.

#### Key Features:

* Chat List: View all chats that matched your keyword rules.
* Full Conversation View: Dive into the full chat thread for context.
* Contact Details: A quick view of the patient's name, phone number, and other key info.
* Chat Summary: AI-generated summary to help agents grasp the situation quickly without reading the full chat.
* Active Session Details: Shows when the conversation happened and whether the session is currently active.

2. Web Bot Assist

Similar to the WhatsApp Assist, this section focuses on Web Bot conversations that include important patient keywords.

#### What's Included:

* Chat List + Full Conversations: Review keyword-triggered chats in detail.
* Contact Details: Instantly see who you're assisting.
* Chat Summary: Save time with AI-generated overviews of each case.
* Conversation Section: View structured bot-patient exchanges clearly.

3. Q&A Dashboard

The Q&A section gives a structured overview of patient queries, making it easy to track unresolved issues, medical context, and follow-up actions.

#### 📑 Table View Includes:

|  |  |
| --- | --- |
| Column | Description |
| S. No | Serial number of the query |
| Contact | Patient name and contact info |
| Status | Current status of the query (e.g.,Answered , not Answered ) |
| Assigned To | doctor assigned to the case |
| Query | Patient's question or concern |
| Diagnosis | Any initial diagnosis or tagging by the team |
| Notes | Internal notes or instructions |
| Tests | Any recommended or completed diagnostic tests |
| Files | Supporting documents, prescriptions, or lab reports |
| Created Date | Timestamp when the query was created |

Care Journeys :

The **Care Journeys** section is designed to manage and automate **health reminder schedules** for patients undergoing treatments or recurring medical interventions (like vaccination schedules, cancer treatment follow-ups, etc.). This feature helps hospitals ensure timely patient engagement across various clinical journeys by sending scheduled reminders either manually or via AI.

### Care Journeys Overview

The Care Journeys module is divided into two main sub-sections:

* **Journeys**
* **Reminders**

### **Journeys – Managing Healthcare Pathways**

This section showcases a collection of predefined medical journeys in a card-style layout, each representing a particular treatment or health program. Examples include:

* Pediatric – Children’s vaccination schedule (e.g., Day 1, 45, 75, etc.)
* Oncology Treatment Journey – Designed for cancer patients with chemo follow-up reminders
* O&M Appointment Scheduling – For long-term service patients requiring periodic maintenance calls
* Weight Loss – 3-month structured care journey
* Heart Disease – Cardiovascular care reminders
* Pain Care for Cramps, and more...

Each card provides a visual preview, a description of the journey, and options to edit or delete the journey.

#### -Clicking on a Journey Card

When you click on a journey, you're taken to a detailed reminder management screen, where you can:

* View all existing reminders in that journey
* See the intervention day, title, and custom reminder message for each stage
* View or update the time of the day each message is sent
* Edit, delete, or add new interventions using the “Add Intervention” button
* Customize the header image associated with each reminder step

#### Manage Patients in a Journey

There’s also a “Manage Patients” tab available for every journey. Here, you can:

* View all patients enrolled in this journey
* Add patients individually or in bulk using “Add Patient to Reminder” or “Add Bulk Patient”
* See each patient’s journey map to track their reminder history
* Remove a patient if their treatment/course is complete

This makes it easy for hospitals to monitor compliance and personalize treatment journeys.

### **Reminders – Custom Scheduling & Tracking**

This section is dedicated to creating, sending, and managing custom patient reminders—outside of predefined journeys.

#### Adding Reminders

You can add reminders in two ways:

* + Add Reminder – For a single patient
* + Add Bulk – For uploading a reminder list in one go

These reminders can be generated:

* Automatically (by AI)
* Manually (by hospital staff)

#### Dashboard Insights

At the top of the Reminders page, you'll find summary statistics:

* Scheduled: Total reminders currently scheduled
* Sent: Number of reminders already sent
* Appointment Rescheduling Rate: Number of reschedules triggered due to sent reminders

#### Reminder Table

Below the stats, there's a detailed table showing all reminders and their statuses. The columns include:

|  |  |
| --- | --- |
| **Column Name** | **Description** |
| Patient Name | Name of the patient |
| Contact Number | Phone number |
| Email | Email ID |
| Added Date | When the reminder was added |
| Scheduled Time | Time and date for when the reminder is set |
| Status | Current status: *Scheduled*, *Sent*, *Added*, or *Failed* |
| Reminder Message | Message content (can be auto-generated by AI or written manually) |
| Generated By | Indicates if the reminder was created manually or by AI |
| Options | Allows editing or deleting the reminder |

You can filter reminders by status, source, or date range, and also download the entire list for offline reporting or record keeping.

Commerce :

The **Commerce** section gives hospitals a complete view of their product-related interactions. Whether a hospital is selling medical equipment, renting out devices, or simply listing items for awareness, this section tracks it all.

From orders and enquiries to managing product listings and Shopify integration, everything is organized in one place. The section is divided into four parts:

### **Product Orders**

This is where you see all confirmed orders from customers. It provides a detailed **table view** of every product that has been ordered, along with the necessary customer and payment details.

**Table Columns:**

* S.No
* Customer Name
* Phone
* Image
* Product Ordered
* Amount
* Payment Status
* Conversation
* Reference ID
* Payment ID
* Ordered At
* Gateway
* Payment Mode

**Key Features:**

* **Search** by customer name, phone number, order ID, or filter by date.
* **Export** the entire list to analyze offline.
* Get a snapshot of your daily product sales activity.

This section is useful for tracking who ordered what and keeping tabs on your revenue stream.

1. **Product Enquiries**

Not every interaction ends in an order. The **Product Enquiries** section tracks users who showed interest or made enquiries but haven’t yet completed a purchase.

**Table Columns:**

* Name
* Phone
* Product Name
* Negotiated Price
* Delivery Address
* Delivery Preference
* Training
* Interested In
* Conversation
* Date
* Options

**Key Features:**

* Understand who’s interested in **buying vs renting** through filters.
* Delete any unwanted or duplicate enquiries from the **Options** column.
* Gain insight into leads that might convert with the right follow-up.

This section is especially helpful for the sales or marketing teams to identify and convert potential leads.

### **Catalog Products**

Here, all the products that your hospital has listed for sale (or rent) are displayed. This acts as your **digital catalog**.

**Table Columns:**

* Product Image
* Product Name
* Availability
* Price
* Inventory
* Availability Status
* Retailer ID
* On Meta
* Description
* Product ID
* Options

**Key Features:**

* **Add New Products** easily to the catalog.
* Toggle **Show Catalog** or **Show Cart** based on how you want to present it to users.
* From the **Options** menu, you can **edit** product details or **delete** them if needed.

### **Shopify Orders**

If your hospital is using **Shopify** for product sales, all the related orders appear here automatically.

**Table Columns:**

* Name
* Phone
* Order Date
* Order ID
* Customer Reply
* Conversation

**Key Features:**

* **Export** data for reporting or follow-ups.
* Filter orders by **name**, **phone number**, or date **interval**.
* Keep track of orders made through your external Shopify storefront.

Field Force :

The **Field Force** section in Prodoc AI is designed to manage the on-ground operations of a hospital—from assigning field tasks to agents, tracking partner engagements, monitoring referrals, and analyzing the overall field performance. It offers complete visibility into how efficiently field agents are working and how partner relationships are growing.

This section is divided into **six key modules**:

### **1. Day Planner**

This is where hospitals **assign field tasks** to agents.

You can:

* Assign visits to field agents.
* Choose the **partners** to visit.
* Specify task types (Primary/Secondary).
* Enable **joint call planning** if needed.
* Add custom instructions in “Field Plan Details”.

The table includes:

* **S.No**
* **Assigned Agent**
* **Partners**
* **Type**
* **Created At**
* **Actions**

**Filters Available:**

* Date
* Branch
* Executive

Use the **“Assign Field Plan”** button to create and schedule new tasks for agents.

### **2. Referrals**

This module shows a detailed log of all referrals made through the system.

The referral table includes:

* **Name**
* **Phone**
* **Refer To?**
* **Referral From?**
* **Status**
* **Comments**
* **Options** (View / Edit / Delete)

**You can:**

* Filter by **created user**, **status**, or **date**
* **Download** the referral list
* **Create new referral** by filling:
  + Name / Select from contacts
  + Refer To (whom it’s referred to)
  + Referral From (who’s referring)
  + Comments

### **3. Partners**

This section is the **partner management hub**.

You’ll see a table listing:

* **S.No**
* **Name**
* **WhatsApp Number**
* **Email**
* **Tags**
* **Status**
* **Gender**
* **Age**
* **Added By**
* **Options** (Edit / Delete)

**You can:**

* Manually **add partners**
* **Import** partners using an authorization form
* **Export** the partner list
* Filter by **branch** (Bangalore, Pune, Chennai, etc.)
* Search by **name**

### **4. Visit Analytics**

A performance breakdown of how field agents are performing their visits.

Highlights:

* Filter by **interval**, **branch**, and **agent**
* View totals: **Planned**, **In-Progress**, **Completed**, **Missed Visits**

**Key Sections:**

1. **Visit Summary Cards**
   * Total visits
   * Completed
   * In-progress
   * Missed
2. **Overview Table**
   * Agent Name, Total Visits, Completed, etc.
3. **Per Visit Table**
   * **Agent Name**
   * **Partner Name**
   * **Location**
   * **Status**
   * **Assigned Date**
   * **Check-In/Out Time**
   * **Comments**
   * **Is Drop-In Visit?**

### **5. Partner Analytics**

This section shows how active and effective your partners are.

**Filters Available:**

* Interval-based filtering
* Export data

**Insights Provided:**

* Total number of partners
* Top referring partners
* Total referrals made
* Average referrals per partner
* Latest referral activity
* Partner-wise breakdown of referral counts

### **6. Field Analytics**

This is the **big picture view**—a high-level dashboard of all field-related metrics across the hospital network.

Divided into two views:

#### **Overview**

* **Cards** showing:
  + Total Field Visits
  + Total Referrals
  + Total Partners
  + Cat A Engagements
* **Performance Snapshot** with:
  + Visit & Referral Trends
  + Visit Status Distribution
  + Partner Summary
  + Top Performers (Referrals)

#### **Visits**

* Filter by **branch**
* See quick-glance cards for:
  + Completed Visits
  + Visits to Cat A Partners
  + Visit Success Rate
* In-depth analytics on:
  + Visits vs Targets
  + Cat A Partner Visits
  + Visit Trends
  + Agent Productivity
  + Detailed Visit Analytics

Settings :

The Settings section in Prodoc AI is the command center where administrators configure how the platform works across departments, channels, and user roles. It brings everything together—AI behavior, channels, billing, user access, analytics, commerce settings, and much more.

Here’s a breakdown of all the modules available at this top level:

1. **Profile** – Set up your hospital’s name, location, and contact details.
2. **Account Settings** – Manage user roles, branches, departments, and access.
3. **Feature Settings** – Customize lead, opportunity, product, and notification settings.
4. **AI Settings** – Configure AI models, rules, flows, and the profile builder.
5. **Channels** – Set up and manage WhatsApp and web bot communication channels.
6. **Billing & Subscription** – View your plan, credit usage, and billing history.
7. **Audit** – Track platform activity through detailed audit logs.
8. **Reports** – Analyze performance of leads, promotions, and commerce.
9. **Commerce Settings** – Manage inventory, pricing, and product configurations.
10. **Promotions** – Create and control campaigns and promotional offers.
11. **Advertisement** – Set up lead sources and advertising players.
12. **Shopify** – Connect and manage your hospital’s Shopify store and data.
13. **Rest API** – Access API keys and integration documentation.
14. **Expert Assist** – Set expert availability and assistant behavior for Q&A.
15. **Custom Settings** – Design and manage WhatsApp custom forms.
16. **Payments** – Configure and control payment methods and gateways.

level-1

### **1. Profile**

* **Location** – Set hospital or clinic addresses
* **Business Details** – Manage name, contact info, and registration

### **2. Account Settings**

* **Roles** – Define user roles and permissions
* **Branches** – Add and manage hospital branches
* **Departments** – Organize internal teams
* **Service Partners** – Manage third-party partner roles
* **Users** – Add, edit, or remove users

### **3. Feature Settings**

* **Leads Settings** – Customize lead capture and handling
* **Appointment Settings** – Configure appointment flow
* **Referral Settings** – Set referral preferences
* **Notification Settings** – Manage internal and patient notifications
* **Auto-generated Reports** – Control automatic report generation
* **Partners Config Settings** – Define partner-related preferences

### **4. AI Settings**

* **Rules** – Set AI rules for behavior and decision-making
* **Media** – Upload images, videos, and files for AI use
* **Profile Builder** – Customize AI response tone and structure
* **Bot Flow** – Design conversation flows

### **5. Channels**

* **WhatsApp Channel** – Manage WhatsApp bot configurations
* **Web Bot** – Set up and update website chatbot

### **6. Billing & Subscription**

* **Subscription** – View and manage your plan
* **Credit Logs** – Monitor credit usage history

### **7. Audit**

* **Audit Logs** – Track platform-wide actions and changes

### **8. Reports**

* **Leads Analytics** – View lead performance data
* **Promotion Analytics** – Track campaign effectiveness
* **Conversation Analytics** – Analyze chat and bot interactions
* **Partner Analytics** – Review partner activity
* **Credit Analytics** – Monitor credit consumption
* **Visit Analytics** – Understand visit-related performance

### **9. Commerce Settings**

* **Commerce Settings** – Configure core commerce options
* **Commerce Configuration** – Manage how product flows are handled
* **Products & Services** – Set up inventory and pricing

### **10. Promotions**

* **Promotion Settings** – Create and manage campaign rules

### **11. Advertisements**

* **Plugins** – Connect third-party platforms
* **Gmail Leads** – Enable Gmail as a lead source
* **Meta Leads** – Manage Meta (Facebook/Instagram) leads
* **Zoho CRM** – Integrate with Zoho

**12. Shopify**

* **Shopify Config** – Connect Shopify store
* **Shopify Analytics** – Track Shopify order and revenue metrics

### **13. Rest API**

* **API Keys** – Generate and manage API access

**14. Expert Assist**

* **Q&A Settings** – Set rules for expert interaction and support

### **15. Custom Settings**

* **WhatsApp Custom Forms** – Create forms for WhatsApp conversations

### **16. Payments**

* **Payments Config** – Set accepted methods and gateways

level-2

## **1. Profile**

This section helps you manage the core identity of your hospital or clinic on the platform.

### **Location**

Update the visual and regional identity of your hospital:

* **Logo** – Upload or change the logo displayed across the tool
* **Timezone** – Set the correct timezone for accurate scheduling and reports
* **Currency Code** – Choose the appropriate currency for all billing and product pricing

### **Business Details**

Keep your business information up to date:

* **Location & Address** – Edit the official address of your hospital or clinic
* **Industry Type** – Specify the healthcare category your institution belongs to
* **Contact Information** – Update office phone number, support email, and other key contact details

## **2. Account Settings**

This section lets you define the structure and access control for your hospital's internal team — from branches to roles and users.

### **Roles**

Define and manage the different roles across your organization:

* View a table listing all roles (e.g. Doctor, Marketing Agent, Receptionist, Service Partner)
* Columns include: Role Name, Created On, Access, Appointment Privileges, Lead Management, Field Agent Flag, and more
* Each role can be edited to fine-tune access, like who can export data or manage leads
* Use the **“Add Role”** button to create custom roles with tailored permissions

### **Branches**

Manage your hospital’s different geographical locations:

* Table shows each branch with details like Name, Contact, Address, and Created Date
* Use the options to edit or delete any branch
* Add new branches using the **“Add Branch”** button

### **Departments**

Organize your hospital’s internal specialties:

* Table lists departments such as Cardiology, Neurology, Psychiatry, etc.
* Columns include Department Name and Created Date
* Edit or delete departments as needed
* Add new departments using the **“Add Department”** button.

### **Service Partner**

This section tracks the individual or organization that oversees the platform setup and support.

* Service Partners have restricted access — they **do not** have permission to modify system-level settings.
* Meant for coordination, not administration.

### **Users**

Manage your hospital staff and their platform access:

* Table lists all users with details such as Name, Contact Info, Type (e.g., Admin, Doctor), Branch, Permissions (Appointments, Lead Management, Field Agent), Reporting Hierarchy
* Add single or bulk users using **“Add User”** or **“Bulk Add”**
* Use filters and search by Name or Type
* Download the full user list for offline analysis

**3. Feature Settings**

Tailor the platform to your hospital’s specific workflow. Feature Settings includes six main sections, each designed to give you precise control over how your operations function:

#### **1. Lead Settings**

* **Lead Priority Criteria**: Define rules for classifying leads based on urgency and importance.
* **Auto Summarize Conversation**: Set how long the system should wait before summarizing conversations.
* **Auto Assign Journey for Leads**: Automatically assign a journey to leads that haven’t booked an appointment.
* **Lead Disposition Table**: Add and manage stages (e.g., New, On-going, Closed) that help track lead progress. Editable and deletable.
* **Lead Age Intervals**: Enable visual indicators (Green, Yellow, Red) to track how long leads have been active. Customize time ranges.
* **Lead Qualification Tags**: Create tags like “Call Back,” “Surgery,” or “Book Appointment” to better categorize leads.
* **Lead Configuration Table**: Customize columns in the leads table to match business needs. Add, hide, or rearrange.
* **Lead Auto Assign**: Automatically distribute leads among team members who manage leads, in a rotating manner.
* **Daily Lead Report**: Enable to receive daily summaries of all leads via email at 8 AM.
* **Track Organic Leads**: Add, edit, or delete entries for leads from organic sources. Includes welcome text and lead source name.

#### **2. Appointment Settings**

* **Appointment Management System**: Choose between Prodoc or your own hospital’s appointment system by providing a URL.
* **Appointment via**:
  + *Prodoc (Default)*: Use the built-in system.
  + *Plugin HIMS*: Integrate with external hospital systems.
* **Configure Appointment Type**:
  + *Doctor-based*: Appointments are booked with individual doctors.
  + *Department-based*: Appointments are booked per department.
* **Appointment Interaction Type**:
  + Webform URL
  + Form
  + Natural Language Text (NLP)
* **Customize Appointment Page**: Define field labels, placeholders, and visibility for a more guided user experience.
* **Follow-up Messages**: Enable to send custom follow-ups 24 hours after the appointment.
* **Appointment Scheduling Options**:
  + *Date & Time*
  + *Date Only*

**3. Referral Settings**

* **Customize Referral Page**: Set up field labels and placeholders. Add or edit fields as needed.
* **Referral Booking via WhatsApp**: Enable form-based referrals via WhatsApp (requires app secret key).
* **Referral Table Configuration**: Add or customize table columns to suit your tracking needs.
* **Dispositions**: Track the status of each referral using dispositions like New, On-going, or Closed.

#### **4. Notification Settings**

* Manage what notifications are sent, through which channels, and to whom (e.g., doctors, patients).
* Columns include: Category, Event, Status, Channels, Send To, WhatsApp Template.
* Search, filter, and add new notifications as needed.

#### **5. Auto-Generated Reports**

* Schedule automatic report generation.
* Define the time and recipient emails.
* Edit or delete existing schedules.

#### **6. Partner Config Settings**

* **Customize Partner add Page**: Choose which fields appear, their labels, and placeholder text.
* Hide, show, rearrange, or add fields based on what information your organization needs to collect or display.

**4. AI Settings**

The AI Settings section offers robust controls to manage the behavior, intelligence, and workflow of AI-based interactions across channels like WhatsApp and the Website. This section is broken into five main parts, each crafted to give hospitals control over how the AI responds, routes conversations, and performs automated tasks.

### **AI Settings**

**WhatsApp AI Status**A toggle switch allows you to enable or disable the WhatsApp AI. When disabled, users won’t receive AI-generated replies when they initiate conversations. This is useful during human-led escalations or want any bot flows .

**Re-enable Time Configuration**You can set the wait time (in minutes) for the AI to become active again after being paused due to human intervention. This ensures smooth transitions back to automated handling without abrupt AI takeovers.

**Bot Flows Activation (WhatsApp & Website)**Two toggle options allow you to control bot flows per channel:

* **WhatsApp Bot Flow**
* **Website Bot Flow**

If enabled, the default bot flow will override AI responses for that channel, giving you structured, rule-based replies.

**AI Prompt**Customize the AI’s base prompt – the instruction that guides how it replies. While editable, caution is advised as this can significantly change response behavior.

**Agent Assist Keywords**Set keywords that, when detected in a user’s chat, flag the conversation for human attention. This supports seamless transition to human agents for sensitive queries. Keywords can be added, edited, or deleted easily. If any keyword found in the chats chat is added in the agent assist section .

**AI Task Management**Enable AI to automatically handle tasks such as:

* Callback
* Follow-up
* Reminder
* Campaign assignment

This reduces manual workload and ensures timely engagement.

### **Rules**

This section allows you to define specific instructions for the AI to follow during conversations.

**Rules Table**

* **Columns**: S.No, Content, Added On, Options (Delete)
* You can add, edit, or remove instructions based on operational needs.

These rules act like guidelines or do’s and don’ts for the AI to follow.

### **Media**

The Media section lists all uploaded media files that the AI might use in conversations (e.g., documents, images, videos).

**Media Table**

* **Columns**: S.No, Type, Text, Link, Added On, Options (Delete)
* Easily upload new media via the **Add Media** button.

This helps the AI provide users with rich media resources during conversations, improving clarity and engagement.

### **Profile Builder**

In this section, you can add structured information that enhances AI personalization for users (especially useful for doctor profiles).

**Profile Table**

* **Columns**: S.No, Type, File Name, Status, Added On, View, Options (Edit/Delete)
* Types include: custom text, user bios, websites, etc.

### **Bot Flow**

This area allows you to manage how conversations are structured using bot flows.

**Bot Flow Types**

* WhatsApp Bot Flows
* Web Bot Flows

You can:

* Create new flows
* Edit existing flows
* Set a default flow
* Delete unnecessary flows

These flows allow you to customize conversation paths and user journeys, replacing AI replies with decision-tree logic when needed.

## **5. Channels**

The **Channels** section lets you manage how your hospital or clinic connects with patients across **WhatsApp**and **Web Bots**. These settings help you configure communication channels that align with your engagement strategy—whether it's automating conversations on WhatsApp or integrating a chatbot on your website.

### **1. WhatsApp Channel**

This section is dedicated to setting up and managing your **WhatsApp Business API integration**. Please note that **only one WhatsApp channel can be active at a time**. If you choose to activate a new one, it will automatically deactivate any currently connected WhatsApp channel.

#### **Meta WhatsApp Business Integration**

Once your WhatsApp account is verified and successfully linked via Meta’s WhatsApp Business API, you'll see a confirmation message:

“Congratulations! Your account verification has been successfully completed. Your WhatsApp Business account is now fully linked with our Customer Engagement Platform.”

Once linked:

* The **Phone** number will be marked as **Connected**
* WhatsApp configurations will be marked as **Live**

This means you're ready to use all the WhatsApp automation features that Prodoc AI offers—like lead generation, appointment scheduling, and follow-ups—seamlessly within the system.

### **2. Web Bot Configuration**

The **Web Bot** section allows you to design and embed a chatbot directly on your hospital's website. This bot can assist users with queries, collect lead information, and more—all while staying on-brand.

#### **Customization Options:**

* **Bot Name**: Set a name that reflects your brand voice or use-case.
* **Pick Your Color Theme**: Match the bot's color to your hospital or clinic's branding.
* **Upload Your Bot Image**: Add a profile picture or logo for a more personalized feel.

#### **Display Branches**

Enable this toggle if you'd like the bot to include a **branch selection field**—useful if your hospital has multiple locations.

#### **Preview Mode**

Activate **Preview Mode** to embed the chatbot in demo environments for internal testing before going live.

#### **Embed Script**

Once the bot is set up, Prodoc AI provides you with a script snippet. You can embed this into your website's code to activate the chatbot:

html

<script

src="https://cep.prodoc.ai/api/webbot/main.js"

data-client-id="660d4391b389336a08ec464d"

async

></script>

This script connects your web bot with the Prodoc platform, enabling real-time interactions, lead capture, and smooth user experiences on your website.

**6. Billing & Subscription**

The **Billing & Subscription** section gives you full control and visibility over your Prodoc AI plan, credit usage, and feature access. It’s split into two parts:

* **Subscription Overview**
* **Credit Logs**

### **Subscription Overview**

This tab helps you understand your current subscription plan, features you’ve purchased, and the breakdown of credits and pricing.

#### **Plan Details**

* **Subscription Type**: SaaS
* **Plan Duration**: *3 Months*
* **Active Period**: From **20-May-2024** to **20-Aug-2024**

If you’re on a trial:

* **Trial Duration**
* **Trial Period**

**Features Bought**

This section lists all the platform features you've subscribed to. It includes a detailed table with the following columns:

* **Feature**: The tool/module name (e.g., KPI Reports, Bot Flows)
* **Description**: What the feature does
* **Fee**: Cost associated (if any)
* **Included in Platform Fee?**: Whether the feature is bundled with your base plan

For example:

* *KPI Reports*: Rs. 0 *(Included)*
* *Bot Flows*: Rs. 5000 *(Extra)*

You’ll find features related to:

* Lead Management
* Appointment Management
* Promotions & Campaigns
* Care Journeys
* Referrals & Partner Management
* AI Q&A
* Product Catalog & Orders

#### **Services Bought**

This is a table of one-time integrations or add-ons you've purchased, such as:

* **Social Media Integration** (Free)
* **HMS Integration** (Rs. 10,000)
* **Plugin Integrations** (CRM, IVR) (Rs. 10,000)
* **Onboarding Support & Product Demo** (Free)

#### **Channels Bought**

This section outlines the monthly pricing for different communication channels you’ve activated:

* **WhatsApp**: Rs. 1000/month
* **Voice**: Rs. 5000/month
* **Website Bots**: Rs. 1000/month

#### **Credit Details**

Used for pay-as-you-go features like voice calls, bot chats, and WhatsApp messaging.

* **Price per Credit**: Rs. 1
* **Available Pack Sizes**: 500, 1000, 2000, 5000, 10000, 20000
* **Credits Remaining**: *2337.62*

A table also shows:

* **Credit Type**: Voice, Bots, WhatsApp
* **Fee**: In credits
* **Consumption Rate**:
  + Voice: 4 credits per minute
  + Bots: 0.01 credit per transaction
  + WhatsApp: 1 credit per transaction

#### **User Count Bought**

Shows how many user accounts your plan supports:

* **Is Unlimited with Platform Fee?**: Yes
* If not unlimited:
  + **Users Included**: 3
  + **Fee Per Extra User**: Rs. 500
  + **Total Limit**: 3 Users

### **Credit Logs**

This tab gives detailed visibility into your **credit usage** and **spending history** across various platform events.

#### **Daily Credit Insights**

At a glance, see how credits are being used:

* **Credits Spent Today**
* **Voice Intelligence Credits**
* **Failed Promotions**
* **Monthly Credits Added**
* **Conversation Usage**
* **Partner/User Creation or Deletion**
* **Appointment Creation**
* **Campaign Retry Attempts**
* **API Consumption**

Example:

* *Promotion Retry*: 1361 credits
* *Conversation*: 1002.33 credits
* *Monthly Credit Added*: 1000 credits

Click **“Show More”** to expand and view all tracked events.

#### **Event Table**

A detailed credit log table with columns:

* **S.No**
* **Event**: Action or usage (e.g., Promotion, Appointment, API call)
* **Timestamp**
* **Amount**: Credits spent
* **Type**: Category of usage

You can also:

* Apply filters (by date range or category)
* Export the table for offline analysis/reporting

## **7. Audit**

The **Audit Logs** section helps you keep track of everything happening on the platform — who did what, and when.

### **What You Can Do:**

* **Search by Username** to trace actions by a specific user
* **Filter by Category** to narrow down the type of events (e.g., login, edits, deletions)
* **Set a Date Range** to view logs for a specific period

### **What’s Displayed:**

A dynamic table that updates in real-time with every user action. Columns include:

* **S.No** – Serial number of the entry
* **Timestamp** – Exact time the action occurred
* **Event** – Type of event (e.g., Role Management, Auth)
* **User** – Who performed the action
* **Message** – A short description of what happened (e.g., *User signed out successfully*)

**8. Reports**

The **Reports** section offers a comprehensive view of your platform’s performance across all key modules — helping you make data-driven decisions. It is divided into **six main parts**, each with date filters, export options, and powerful visual insights.

### **Leads Analytics**

Gain visibility into how leads are being generated, handled, and distributed.

**At a glance, you’ll see:**

* **Total Leads**
* **Highest Leads (by source/channel)**
* **Leads with No Action Taken**
* **Average Leads per Day**

A chart on the side shows **Leads Manager-wise Breakdown**, helping you track who’s driving the most engagement.

Date Interval Filter  
Export Option Available

### **Promotions Analytics**

Track the performance of your broadcast campaigns.

**Key Metrics:**

* **Total Broadcasts**
* **Group Broadcasts**
* **Total Sent**
* **Total Delivered**

**Visuals:**

* **Line Plot**: Broadcast statistics over time
* **Pie Chart**: Status distribution – *Delivered, Sent, Read, Replied, Failed*

Date Interval Filter  
Export Option Available

### **Conversation Analytics**

This section helps you evaluate AI conversations across **WhatsApp** and **Voice Channels**.

#### **WhatsApp Conversations**

**Insights Available:**

* Total Conversations
* Average Conversations
* Marketing Initiated
* User Initiated

**Line Plot**: Daily breakdown of conversations over time

#### **Voice Conversations**

Toggle between **Incoming** and **Outgoing** call metrics.

**Metrics:**

* Incoming Calls
* Outgoing Calls
* Abandoned Calls

**Charts Provided:**

* Date-wise distribution
* Tag-wise breakdown (based on call intent or patient need)

Date Interval Filter  
Export Option Available

### **Partner Analytics**

Evaluate the engagement and contribution of your referral partners.

**You’ll See:**

* Total Number of Partners
* Top Referring Partners
* Total Referrals Made
* Average Referrals per Partner
* Latest Referral Activity
* Partner-wise Referral Breakdown

Interval Filter Available  
Data Export Option

1. **Credit Analytics**

Track credit usage and refunds across modules.

**Cards Display:**

* Credits Added
* Total Credit Spent
* Credit Refunds
* Credits Remaining

**Visuals:**

* **Bar Plot**: Credit spent across different modules (Voice, Conversations, Promotions)
* **Refund Graph**: Failed promotions vs refunded credits

Date Filter Available  
Data Export Option

### **Visit Analytics**

Monitor hospital or clinic visits logged via the platform.

Currently, this section shows:

* **Search by Name / Interval / Phone**
* **No Check-ins Message** if no records match selected filters

Data Export Option Available

**9. Commerce Setting**

The **Commerce Settings** section helps you manage all things related to your hospital's product catalog — including Meta catalog integration and setting up your own list of services, equipment, or offerings. It’s split into **three key parts**:

### **Commerce Settings**

At the top, there’s a simple toggle called **Catalog Activation Status**.

* If **turned off**, users won't be able to configure or manage catalog products in the system.
* Keeping it **on** allows seamless access to add, view, and manage your hospital’s products/services through the platform.

### **Commerce Configuration**

This section guides you through the steps to integrate your **Meta (Facebook) Catalog** with Prodoc AI.

Here’s how the setup flows:

1. **Meta Catalog Configured Status** – This confirms if your Meta catalog is already linked.
2. **Setup FB Catalog** – Takes you to the Meta Business Manager or Commerce Manager to begin setup.
3. **Give Access to Prodoc** – You’ll need to add Prodoc as a catalog partner using the business ID: 331990152530532.
4. **Connect Catalog to WhatsApp** – Final step to enable product sync with your WhatsApp channel.
   1. **Enter Facebook Catalog ID** – Paste your catalog ID and hit **Connect** to start fetching products.

You can also **delete** the integration if needed.

### **3. Products & Services**

This part is divided into two sections — **Product Categories** and **Products**.

#### **Product Categories**

Here, you can manage categories for your services and offerings (like Diagnostic Equipment, Surgery Packages, etc.).

* Add new categories by clicking the **“Add Category”** button.
* A table lists all existing categories with the following details:
  + **Category Name**
  + **Image**
  + **Description**
  + **Indication of Usage**
  + **Audience**
  + **Options** (Delete option available)

**Products**

This section lets you manage all products or services offered under each category. These could be anything from consultation packages to hospital devices.

* Add new products using the **“Add Product”** button.
* All products are displayed in a table with:
  + **Name**
  + **Category Name**
  + **Image**
  + **Description**
  + **Indication of Usage**
  + **Audience**
  + **Sale Price**
  + **Rental Price**
  + **Options** (Edit/Delete)

Everything here is customizable — so hospitals can maintain a structured catalog tailored to their services, whether they’re selling or renting equipment, offering packages, or listing other services.

## **10. Promotions Settings**

Fine-tune how your promotional campaigns behave and follow up automatically with smart settings.

### **Promotion Retries**

Enable or disable automatic retries for failed promotions.  
You can also define **how many retry attempts** the system should make if a message doesn’t go through the first time.

### **Exclude Lists from Promotions**

Choose specific contact lists to **exclude** from your campaigns.  
This is helpful when you don’t want certain audiences (like recent responders or internal teams) to receive promotions.

### **Auto Create Follow-up Tasks**

Automatically generate follow-up tasks for contacts who **didn’t engage or respond** to a campaign.  
Set conditions to trigger these tasks, so your team can reach out manually and increase conversion.

**11. Advertisements**

The **Advertisements** section is where we manage integrations with external lead sources and CRMs. These help us pull in leads from platforms like Gmail, Meta (Facebook), and Zoho, and make it easier to sync everything with Prodoc AI.

This section has four main parts:

### **1. Plugins**

Before you can use any of the lead sources, you first need to **configure the required plugins**.You can add any plugin its the super admins wish .

#### **Default Plugins:**

* **Meta**
* **Gmail**
* **Zoho**

Here’s how to configure each:

* **Meta (Facebook)** → Just click on **Configure**, and log in using your **Facebook** account to give the necessary permissions.
* **Gmail** → Click on **Configure**, and log in with your **Google account** to sync emails and retrieve leads.
* **Zoho** → This one needs a few extra steps:
  1. Go to your **Zoho Bookings Dashboard**.
  2. Navigate to: Setup → Workspaces → Custom Functions.
  3. Enable the required **triggers** in both Zoho Bookings and Prodoc.
  4. Click **Configure** in Prodoc.
  5. Copy the script provided by Prodoc and paste it into **Deluge** under the appropriate Zoho action.

Once configured, your plugin status should show as **active** and you're good to go!

### **2. Gmail Leads**

Once the **Gmail Plugin** is configured, you get two main features:

* **Lead Retrieval**: Automatically pulls in leads from your Gmail inbox.
* **Scheduled Load Retrieval/Engagement**: You can set up regular intervals for Prodoc to check for new leads or send out engagement emails.

*Syncing your Gmail account is required to enable this section.*

### **3. Meta Leads**

This is similar to Gmail Leads but works with Facebook/Meta.

* **Lead Retrieval**: Pulls in leads from your Facebook ad campaigns.
* **Scheduled Load Retrieval/Engagement**: Lets you automate lead pulling and follow-ups.

*Just make sure the* ***Meta Plugin*** *is configured by logging in with Facebook.*

### **4. Zoho CRM**

If your hospital uses **Zoho CRM**, this integration can sync data like Leads, Contacts, and Accounts with Prodoc in real-time.

#### **Things to Enable:**

**Zoho APIs:**

* Leads API
* Contacts API
* Accounts API

**Zoho Webhooks:**

* Lead Creation Webhook
* Contacts Webhook
* Accounts Webhook

Once enabled, Prodoc can:

* Automatically pull in new leads created in Zoho.
* Sync contact or account information.
* Reduce the need to switch between multiple tools manually.

**12. Shopify**

The **Shopify** section in Prodoc AI allows you to connect your commerce platform directly with the system, enabling automated workflows and engagement based on user activity in your store. This section is divided into two main parts:

### **1. Shopify Configuration**

This is where you configure your Shopify integration to track important customer events like **Order Creation** and **Abandoned Checkout**.

#### 

#### **Webhook Setup**

Each Shopify event (like an order or abandoned cart) is linked to a specific **Webhook URL** provided by Prodoc. Once configured in your Shopify store, these URLs help capture and trigger relevant data back into the Prodoc system.

Here’s how it works:

* **Event Name**: The type of customer activity to track (e.g., Abandoned Checkout, Order Creation).
* **Webhook URL**: This URL is auto-generated by Prodoc and must be added to your Shopify admin under webhook settings.
* **Actions**: You can delete any existing webhook connection using the trash icon.

#### **Webhook Secret**

You can set a Webhook Secret for added security. This ensures that only verified requests are accepted from Shopify.

#### **Event Configuration**

For each event, you can further customize:

* **Initial Interval**: Set a delay before an automation or message is triggered.
* **Initial Template**: Select a message template (e.g., WhatsApp reminder) to engage users for the selected event.

All of this can be modified by clicking the **Edit Configuration** button.

### **2. Shopify Analytics**

Once the events are configured and connected, you can monitor how they’re performing under the **Shopify Analytics**section.

This section presents a **summary table** with the following columns:

* **Event**
* **Sent**
* **Delivered**
* **Read**
* **Failed**
* **Action**

If no data is available, a “No data” placeholder is shown.

### **13. REST API**

This section allows you to generate and manage API keys to securely integrate Prodoc AI with external systems or services.

* **API Keys Table:**Displays existing API keys in a table format with the following columns:  
  S.No, Name, API Key, Created At, Options (Edit/Delete).
* **API Docs:**A direct link to view detailed API documentation.
* **Key Management:**You can create up to **5 API keys**, each uniquely named and time-stamped. These keys can be edited or deleted at any time.

### **14. Expert Assist**

Manage how user queries are handled—whether by AI or medical experts.

* **Expert Assist Toggle:**Decide whether AI should handle all patient queries or escalate them to a real doctor for review.
  + **Enabled:** Queries may be routed to consultants.
  + **Disabled:** All queries are answered by the AI directly.
* **Consultant and Assignment Preferences:**
  + **Senior Consultant Selection:** Choose a lead consultant to oversee and respond to escalated queries.
  + **Assignment Preference:**
    - **User Choice:** Patients choose which consultant they want.
    - **Doctor Preference:** Automatically assigns queries based on doctor availability.

### **15. Custom Settings**

Manage all your **WhatsApp Custom Forms** in one place.

* View a list of created forms in a table with details:
  + **S.No, Name, Form ID, Total Responses, Download Responses**
* Quickly **search by form name** to find the one you need.
* Use the **Download Responses** option to export collected data for further use.

### **16. Payments**

Configure your **payment gateway** and set up how your hospital accepts payments.

* Use the **Payments Config** to connect and manage supported payment methods.