

# Final Implementation Checklist

## AI Assistant - Attract

Before launching your RevenueWell AI Assistant, it's important to double-check every setting so your patients get the best possible experience from day one. This checklist walks you through each step — from installing the chat widget and customizing its look to setting up FAQs, verifying phone numbers, and enabling online scheduling. Following these steps ensures your AI Assistant is functional, accurate, and aligned with your practice's brand.

### 1. Install the Web Chat Widget

- Get the embed code:** Go to RevenueWell > Settings > AI Settings > Web Chat Agent Configuration.
- Add it to your website:** Paste the code before the closing </body> tag on your website or place it in your CMS widget area if available.
- Test the widget:** Open your live website (not just the preview) and make sure the chat appears on all pages and loads without errors.

### 2. Customize How the AI Widget Looks

- Upload an avatar (optional):** Image should be 120x120px in JPG, PNG, GIF, or WEBP format.
- Set the chatbot title:** Use something patient-friendly like "Dental Assistant" or "SmileBot."
- Match your brand colors:** Choose a main color that matches your logo or website theme.
- Create a welcoming intro message:** Add something like, "Hi! I'm here to help you schedule appointments, answer questions, and more."

### 3. Upload & Test Your Practice FAQ

- Download the FAQ template:** From AI Settings > Practice FAQ.
- Fill it out in .txt format:** Add the most common patient questions and clear, helpful answers.
- Upload the FAQ file:** Go to AI Settings > Practice FAQ and upload the updated .txt document.
- Save your old FAQ:** Download and store your current FAQ before replacing it.



- Test it:** Ask the AI Assistant a few of the questions you entered to ensure it responds correctly.

#### 4. Verify AI Phone Numbers (Voice/Text)

- Find your AI inbound number:** Located under AI Settings > Phone Numbers (this is the number patients will call).
- Find your AI outbound number:** Also under Phone Numbers (used for calls and texts sent by the AI Assistant).
- Update your phone system:** Add the AI inbound number to your phone tree or PBX so calls route to the AI Assistant.
- If you don't use RW Phone:** You must manually configure your call routing to send calls to the AI number.
- Test both numbers:** Call and text each number to confirm they are working as expected.

#### 5. Set Up the AI Scheduling Agent (optional but recommended)

- Enable scheduling:** In Appointment Type Settings, turn on both the AI Assistant and Direct Booking toggles.
- Use patient-friendly appointment names:** Map each appointment type to an easy-to-understand category (e.g., "Teeth Cleaning" instead of "Prophy").
- Assign providers & rooms:** Make sure each appointment type has the correct operatories and providers selected.
- Check calendar sync:** Confirm your PMS calendar availability is syncing correctly so patients only see open time slots.

#### 6. Maintain Clean Patient Data

- Verify patient details:** Ensure each patient record includes first name, last name, phone number, and date of birth. The AI Assistant can only verify patients when all four details match exactly.
- Audit regularly:** Review and update patient records to fix typos, missing fields, or outdated information.
- Train your team:** Remind staff to confirm and update patient info at every interaction to keep records accurate.



## Final Go-Live Confirmation

- AI chat widget is visible** and interactive on all live website pages.
- FAQ answers are loading** correctly when patients ask questions.
- AI phone numbers are tested** and routing properly for both calls and texts.
- Scheduling logic is accurately booking** AI appointments with the correct times providers.

If you have questions or concerns about these implementation steps, reach out to your Onboarding Specialist anytime. We're here to help you get the most out of your new AI-powered teammate!