

# Final Implementation Checklist

## AI Receptionist - Independent

Before launching your RevenueWell AI Receptionist, 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 agents. Following these steps ensures your AI Receptionist is functional, accurate, and aligned with your practice's brand.

### 1. Install the Web Chat Widget

- Get the embed code:** Go to Configuration > Agents > Appointment Management > Web Chat Agent.
- 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 name:** 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 greeting 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:** Access the recommended template [here](#).
- Fill it out in the correct format:** Add the most common patient questions and clear, helpful answers in txt, docx, or pdf format.
- Upload the FAQ file:** Go to Configuration > FAQs > Create FAQ and upload the your document.
- Assign the FAQ to an Agent:** Go to Configuration > Agents and assign your new FAQ to relevant AI agents.



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- Test it:** Ask the AI Receptionist 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 Configuration > Agents > Appointment Management and select a location to see the inbound phone number.
- Find your AI outbound number:** Under outbound agents, find the outbound phone numbers (used for AI Receptionist outreach via call and text).
- Update your phone system:** Add the AI inbound number to your phone tree or PBX so calls route to the AI Receptionist.
- If you don't use RevenueWell Phone:** You must manually configure your call routing to send calls to the AI number. Contact your phone vendor to complete.
- Test both numbers:** Turn on your agents and test each number to confirm they are working as expected.

#### 5. Set Up Appointment Settings

- Enable scheduling:** In Configuration > Appointment Settings, select your preferences for AI scheduling.
- 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 Receptionist 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.
- ✓ **Appointment logic is accurately booking** appointments with correct times and 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!