

DENTAL PRACTICE OS

Every patient conversation ends inside your PMS — booked, deposited, and confirmed. Not just chatted with.

Most dental automation stops at the chat window. A bot answers a question, maybe checks a generic calendar, and then a staff member still has to open the practice management system, find the patient, create the record, and book the slot by hand.

Dental Practice OS is built the other way round. The agent works inside your PMS from the first message — reading real availability, creating the patient record, holding the slot, and moving it from tentative to confirmed the moment a deposit is paid. Your team stops re-entering the same booking twice, and no slot is ever promised that doesn't actually exist.

Built on CRMBridge, our PMS integration layer, connecting to Dentally, Exact, SOE, and other practice management systems used across single practices and multi-location groups.

What Makes This Different

- Real slots, not a proxy calendar — the agent reads live availability straight from your PMS, so what's offered to a patient is what's actually open.
- Patients are created directly in the PMS — no separate contact list for your team to reconcile against patient records.
- Deposits gate the booking — a slot is held tentatively, a Stripe invoice goes out automatically, and payment is what moves it from held to booked.
- No-shows drop before they happen — unpaid holds release automatically, so the slot goes back on the books instead of sitting blocked.
- Nothing gets stuck without a human — flagged replies and complex cases escalate to your team, who can join the live conversation at any point.

What This Fixes

1. Get Found and Get Chosen

Website, local SEO, Google Business Profile, review generation

The problem

Patients compare practices before they ever call. A dated website or a thin Google presence loses them before the conversation starts.

What you get

A website and local search presence built to convert, a stronger Google Business Profile, and steady review generation that gives new patients a reason to choose you.

2. Answer Instantly — PMS-Aware

Website chat, WhatsApp, Instagram DM, always checking real availability

The problem

A generic chatbot can answer FAQs but can't tell a patient what's actually available, so the conversation still ends in a phone call.

What you get

A conversational agent that reads live availability from your PMS and offers real appointment slots in the same message — no back-and-forth, no placeholder calendar.

3. Book Directly Into the PMS, Deposit-Gated

Patient record creation, tentative hold, Stripe deposit, auto-confirm

The problem

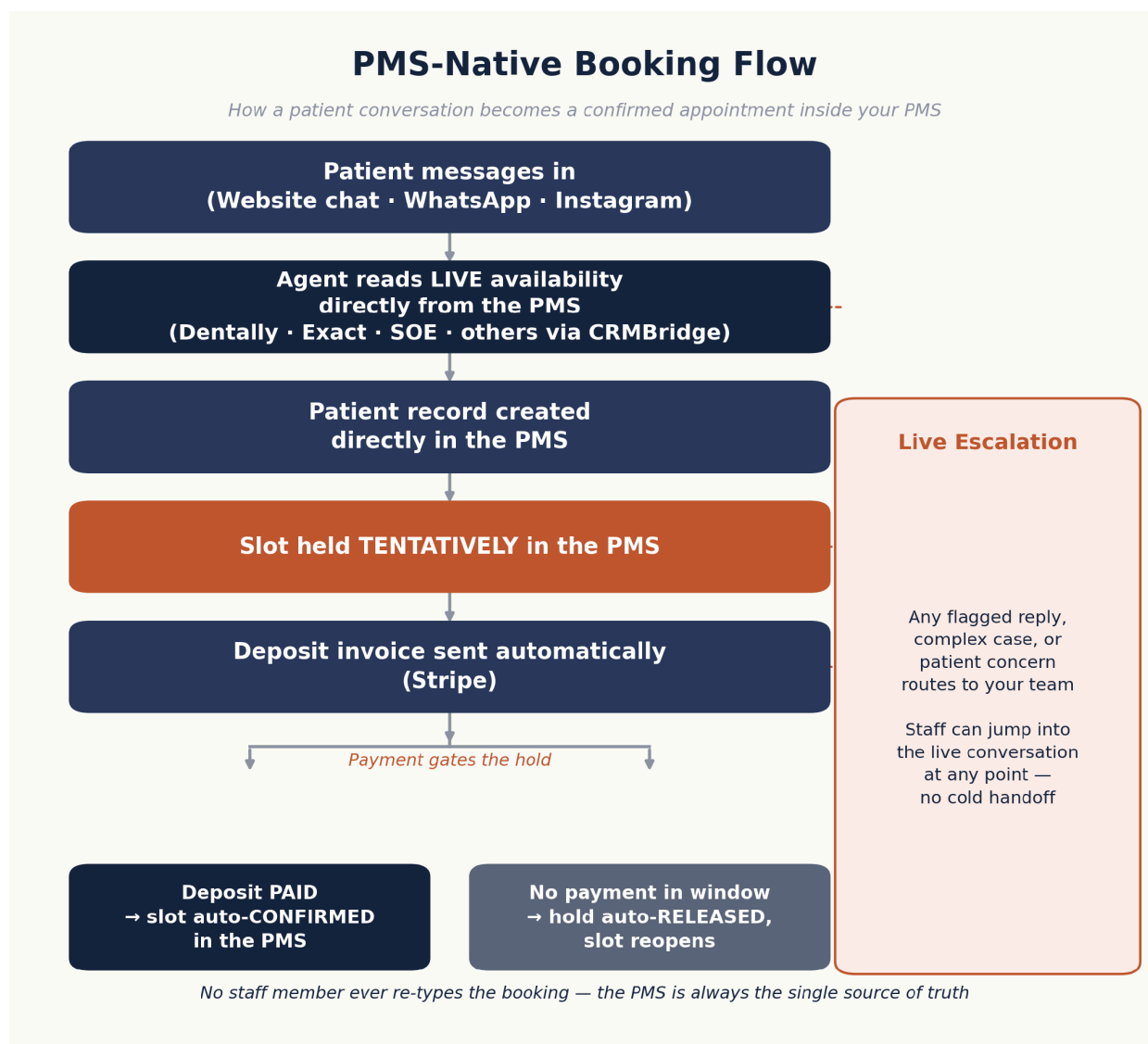
Booking a new patient today usually means a staff member re-typing details from a chat or call into the PMS by hand, and slots are promised before anyone has committed to showing up.

What you get

The patient record is created directly in the PMS, the slot is held tentatively, and a deposit invoice is sent automatically. Payment moves the hold to confirmed; a missed payment window releases it automatically.

The Booking Flow

Everything above happens inside a single, PMS-native flow — no spreadsheet, no second calendar, no manual re-entry:



4. Never Lose a Call or Message

Missed-call text-back, instant reply on every channel

The problem

What you get

Every missed call gets an instant text back within seconds, and every website, WhatsApp, or

The front desk is busy with the patient in the chair, the phone rings, and that caller moves on to the next practice on Google.

Instagram message is answered immediately — day or night.

5. Stay Top of Mind

Social content, comment and DM automation

The problem

Treatment decisions take time. A patient who isn't ready this month goes quiet if nobody keeps the conversation warm.

What you get

Steady content around treatments, practice updates, and patient stories, with every comment and DM answered quickly so interest doesn't go cold.

6. Reactivate the Patient List

Recall and hygiene reminders, lapsed-patient win-back, SMS/WhatsApp

The problem

Your PMS holds years of patients who are overdue for a check-up or never rebooked, and most of that list goes untouched between visits.

What you get

Automated recall and hygiene reminders, and win-back campaigns for lapsed patients, feeding straight back into the same PMS-native booking flow.

7. Escalate Without Losing the Thread

Live handover to your front desk or treatment coordinator

The problem

A patient with an insurance question, a complex treatment plan, or a genuine concern needs a person — and a bot that can't hand off cleanly just frustrates them.

What you get

Flagged replies and complex cases route straight to your team, who can step into the live conversation at any point, with full context, and take it from there.

Why This Works

- Everything is connected. New patient enquiries, recall campaigns, and reactivation messages all flow into the same PMS-native booking process — not a separate silo that someone has to reconcile.
- The PMS is always the source of truth. No shadow spreadsheet, no second calendar to keep in sync, no double-booked chairs.
- Deposits protect chair time. A tentative hold that isn't paid releases itself, so unpaid interest never blocks a real booking.
- Your team stays in control. Every flagged conversation is one click away from a human, with the full thread already visible.
- It works while the practice is closed. New enquiries at 9pm get a real answer with a real available slot, not a “we'll call you back.”

Built for Single Practices and Multi-Location Groups

The same PMS-native foundation adapts to a single practice or a multi-location group. For groups, the agent is location-aware from the first message — routing the enquiry, the availability check, and the booking to the correct branch's PMS instance, so no location ends up working from a shared or generic calendar.

Reporting and escalation roll up across locations, so a practice manager or ops lead can see enquiry volume, booking conversion, and flagged conversations for the whole group in one place, while each location's front desk only sees its own.

Full Service List

The technical breakdown for anyone who wants to see exactly what's on the table. Core systems are where most practices start; optional systems are layered in based on goals, patient volume, and which PMS and payment tools are already in place.

Core Systems

Build the PMS-native foundation that turns enquiries into confirmed, paid appointments.

Category	Services
PMS Integration	CRMBridge connection to Dentally, Exact, SOE, or other supported PMS; live availability sync; patient record creation
Booking Agent	Website chat, WhatsApp, and Instagram DM agent that reads real slots and books directly into the PMS
Deposit Gating	Stripe invoice automation, tentative hold logic, auto-confirm on payment, auto-release on timeout
Call & Message Handling	Missed-call text-back, instant reply across all channels
Live Escalation	Flagging rules for complex cases, real-time handover to front desk or treatment coordinator
Website & Local Presence	Website, local SEO, Google Business Profile, review automation

Optional Systems

Layered in once the core is running, based on where you want to grow next.

Category	Services
Content	UGC/reels, treatment content, carousels, Instagram comment automation, DM agent
Paid Ads	Meta Ads for new patient acquisition, treatment-specific campaigns

Category	Services
Recall & Reactivation	Hygiene/recall reminders, lapsed-patient win-back, SMS/WhatsApp/email campaigns
Multi-Location Routing	Location-aware booking, group-level reporting and escalation roll-up
Post-Treatment	Review requests, referral prompts, post-treatment check-in campaigns

Get Started

Book a call and we'll walk through your current PMS, booking process, front-desk workload, and patient list, identify where enquiries or chair time are being lost, and recommend which systems to install first — no generic bundle, no pressure to buy everything.