

DENTRA - User Workflow & Business Benefits Guide

DOCUMENT PURPOSE

This document explains:

1. **How dental clinic staff use Dentra in their daily operations**
2. **What problems Dentra solves**
3. **Business benefits and ROI**
4. **Real-world usage scenarios**

Audience: Dental clinic owners, managers, receptionists, and staff

THE PROBLEM DENTRA SOLVES

Current Pain Points for Dental Clinics

1. Missed Calls = Lost Revenue

- 30-40% of dental clinic calls go unanswered during busy hours
- Average new patient value: \$1,200-\$3,000 per year
- Just 3 missed calls per day = **\$100K+ in lost annual revenue**

2. Staff Overwhelmed

- Receptionists juggling phones, check-ins, and paperwork
- Can't answer calls while helping patients at front desk
- After-hours calls go straight to voicemail
- Lunch breaks and staff meetings = no coverage

3. Poor Patient Experience

- Patients calling 3-4 times before getting through
- Long hold times (5-10 minutes average)
- Voicemail frustration ("I never hear back!")
- Patients call competitors instead

4. Manual Appointment Management

- Receptionist spends 2-3 hours/day scheduling
 - Double bookings and scheduling errors
 - No-shows due to poor confirmation process
 - Difficult to track appointment patterns
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HOW DENTRA SOLVES THIS



AI Voice Agent (24/7 Coverage)

What it does:

- Answers ALL incoming calls instantly (even during busy hours)
- Understands patient requests in natural conversation
- Books appointments automatically
- Handles FAQs (office hours, insurance, location)
- Escalates complex requests to human staff
- Works after-hours, weekends, and holidays

Business Impact:

- **Zero missed calls** = capture every revenue opportunity
 - **24/7 availability** = serve patients anytime
 - **Instant response** = better patient satisfaction
 - **Staff relief** = receptionists focus on in-office patients
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Ops Console Dashboard (Real-Time Visibility)

What it does:

- Shows all calls handled by AI in real-time
- Displays appointment bookings and confirmations
- Alerts staff to escalated calls needing attention
- Tracks system performance and revenue impact
- Provides clinic-by-clinic analytics

Business Impact:

- **Full transparency** = know exactly what AI is doing
 - **Quick response** = handle escalations immediately
 - **Data-driven decisions** = see what works
 - **ROI tracking** = measure actual revenue captured
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USER ROLES & WORKFLOWS

1. CLINIC RECEPTIONIST / FRONT DESK STAFF

Daily Morning Routine (5 minutes)

8:00 AM - Start of Day

1. Open Dentra Dashboard

- URL: `https://dentra-backend-zlxaiu.abacusai.app/dashboard/`
- Log in (if authentication enabled)

2. Check Overnight Activity

- Look at "Total Calls" stat card
- See how many calls AI handled after hours
- Review "Escalations" - any urgent calls?

3. Review New Appointments

- Click "Appointments" in navigation
- Filter to today's date
- See all AI-booked appointments
- Verify appointment details are correct

4. Handle Escalations (if any)

- Click "Escalations" in navigation
- See calls that need human follow-up
- Examples:
 - Complex insurance questions
 - Emergency dental issues
 - Special accommodation requests
 - Call patients back using provided phone numbers
 - Mark escalations as "Resolved" once handled

Benefit: Know exactly what happened overnight without checking voicemail or missing anything

Throughout the Day

Scenario 1: Patient Calls During Busy Period



What Happens:

- Receptionist is helping a patient at front desk
- Phone rings - another patient calling
- **Dentra AI answers automatically**
- Patient: "Hi, I need to book a cleaning appointment for next week"
- AI: "I'd be happy to help you schedule a cleaning! What day works best for you?"
- Patient: "Tuesday afternoon if possible"
- AI: "I have Tuesday at 2 PM available. Does that work?"
- Patient: "Perfect!"
- AI: "Great! You're all set for Tuesday at 2 PM. You'll receive a confirmation text. Can I help with anything else?"
- **Appointment automatically added to schedule**

Receptionist's Role:

- **Nothing!** AI handled it completely
- Appointment appears in Dentra dashboard automatically
- Receptionist sees it in "Recent Appointments" table
- No interruption to current patient interaction

Benefit:

-  Zero calls missed during busy times
-  Receptionist gives full attention to in-person patients

- ☒ Calling patient gets instant service
 - ☒ Appointment booked correctly without manual entry
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Scenario 2: Complex Request (Escalation)

What Happens:

- Patient calls with insurance question AI can't answer
- AI: "That's a detailed insurance question. Let me have someone from our office call you back within the hour. What's the best number to reach you?"
- Patient provides callback number
- AI: "Perfect, our team will call you back at [number] within an hour. Is there anything else I can help with?"
- **Call logged as "Escalation" in dashboard**

Receptionist's Role:

1. Dashboard shows alert: "1 new escalation"
2. Click "Escalations" to view details
3. See: "Patient John Smith - Insurance question - Callback: +1-555-0123"
4. Call patient back and resolve issue
5. Mark escalation as "Resolved" in dashboard

Benefit:

- ☒ Patient gets acknowledgment immediately (not voicemail)
 - ☒ Receptionist handles it when convenient
 - ☒ Nothing falls through the cracks
 - ☒ Professional, organized follow-up
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Scenario 3: After-Hours Call

What Happens (7:00 PM - Office Closed):

- Patient has tooth pain, calls the clinic
- **Dentra AI answers:** "Thank you for calling SmileCare Dental. Our office is currently closed, but I can help you schedule an appointment or answer common questions. If this is a dental emergency, I can connect you with our after-hours emergency line."
- Patient: "I need to schedule a checkup for next month"
- AI books appointment for 3 weeks out
- **Or** if emergency: AI provides emergency dentist contact info

Receptionist's Role (Next Morning):

- Check dashboard at 8 AM
- See overnight appointments in "Recent Appointments"
- Call patient to confirm (optional)
- Appreciate that revenue was captured even when office was closed

Benefit:

- ☒ Never lose a patient to "closed office" frustration
- ☒ Capture appointments 24/7
- ☒ Emergency patients get proper guidance
- ☒ Staff doesn't need to be on-call

2. CLINIC MANAGER / OWNER

Weekly Review (15 minutes every Monday)

1. Open Dentra Dashboard

- Navigate to: <https://dentra-backend-zlxaiu.abacusai.app/dashboard/>

2. Review Performance Stats

Total Calls Card:

- See total calls handled last week
- Example: "147 calls" (vs. ~40-50 you would have answered manually)
- Success rate: 95% handled without escalation

Appointments Card:

- See total appointments booked by AI
- Example: "38 new appointments"
- Confirmation rate: Shows how many confirmed vs. cancelled

Estimated Revenue Card:

- See projected revenue from AI-booked appointments
- Example: "\$12,400 estimated" (38 appointments × \$326 average)
- This is revenue that would have been LOST without Dentra

Escalations Card:

- See how many calls needed human follow-up
- Example: "8 escalations" (5% of total calls)
- Good indicator of AI effectiveness





1. System Health Check

- Scroll to "System Health" section
- Verify status is "Healthy" (green)
- Check metrics:
 - Error rate: Should be <1%
 - Escalation rate: Typically 5-10%
 - Average call duration: Usually 2-4 minutes

2. Clinic-by-Clinic Analysis (Multi-location practices)

- Use "Clinic Selector" dropdown
- Compare performance across locations
- Example: "Downtown location has 2x more calls than uptown"
- Make staffing decisions based on data

Benefits:

-  **ROI Visibility:** See exact revenue impact
 -  **Data-Driven Decisions:** Know which services are most requested
 -  **Quality Assurance:** Ensure AI is performing well
 -  **Multi-Location Insights:** Compare clinic performance
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Monthly Business Review (30 minutes)

1. Click “Calls” in Navigation

- Review full call log for the month
- Identify patterns:
 - Peak call times (adjust staffing)
 - Common questions (update website FAQ)
 - Drop-off points (improve AI responses)

2. Click “Appointments” in Navigation

- See all appointments booked this month
- Filter by status:
 - Confirmed appointments
 - Cancelled appointments (identify why)
 - No-shows (improve reminder system)
 - Calculate conversion rate

3. Analyze Escalations

- Click “Escalations” in navigation
- Review all escalated calls this month
- Identify common themes:
 - If many insurance questions → train AI better
 - If many emergency calls → improve emergency protocol
 - If many pricing questions → update AI script

4. Calculate ROI

Example Calculation:

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Monthly AI-Booked Appointments: 150

Average Patient Lifetime Value: \$2,000

Conversion Rate (booked → showed up): 80%

Monthly Revenue Impact:





150 appointments × 80% conversion × \$2,000 = \$240,000

Dentra Monthly Cost: ~\$500-\$1,000

ROI: 240x return on investment

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Benefits:

-  **Prove Value:** Show board/partners the ROI
 -  **Continuous Improvement:** Identify and fix issues
 -  **Strategic Planning:** Make informed expansion decisions
 -  **Staff Optimization:** Know when to hire vs. rely on AI
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3. DENTIST / CLINICAL STAFF

Morning Schedule Check (2 minutes)

1. **Open Dentra Dashboard on Phone/Tablet**

- Works on any device (responsive design)

2. **Click “Appointments”**

- See today’s full schedule
- AI-booked appointments clearly marked
- Patient names, services, and times

3. **Review Patient Details**

- Click on appointment to see details
- New patient vs. returning patient
- Service requested
- Any special notes from AI conversation

Benefit:

- ☒ Know your schedule without asking reception
 - ☒ Prepare for new patients
 - ☒ Manage your time effectively
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4. MULTI-LOCATION PRACTICE ADMINISTRATOR

Enterprise Dashboard View

1. **Clinic Selector = “All Clinics”**

- See aggregated stats across all locations
- Total calls for entire practice
- Total appointments across all clinics
- Combined revenue impact

2. **Individual Clinic Analysis**

- Select “Downtown Dental Associates” from dropdown
- See performance for just that location
- Compare to other locations
- Identify high/low performers

3. **Resource Allocation**

- If one clinic has high escalation rate → needs more staff training
- If one clinic has low call volume → marketing opportunity
- If one clinic has high appointment cancellations → improve reminder process

Benefits:

- ☒ **Centralized Management:** Monitor entire practice from one dashboard
 - ☒ **Fair Comparison:** Standardized metrics across locations
 - ☒ **Strategic Expansion:** Use data to decide where to open new clinics
 - ☒ **Staff Benchmarking:** Identify best practices to share
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BUSINESS BENEFITS & ROI



Revenue Impact

Small Practice (1 Location)

Scenario: 3-doctor dental practice

Without Dentra:

- 20 calls/day × 30% missed = 6 missed calls/day
- 6 missed × 5 days/week × 50 weeks = 1,500 missed calls/year
- 1,500 calls × 30% would book = 450 lost appointments/year
- 450 appointments × \$2,000 average lifetime value = **\$900,000 lost revenue**

With Dentra:

- 0 missed calls (AI answers 24/7)
 - 450 additional appointments booked
 - **\$900,000 in captured revenue**
 - Dentra annual cost: ~\$10,000-\$15,000
 - **ROI: 60x-90x return**
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Medium Practice (3-5 Locations)

Scenario: 5-location dental group

Without Dentra:

- Each location loses \$900K/year (per above)
- 5 locations × \$900K = **\$4.5M lost annually**

With Dentra:

- Captures that \$4.5M in revenue
 - Reduces receptionist workload by 60%
 - Improves patient satisfaction scores
 - Annual Dentra cost: ~\$40,000-\$50,000
 - **ROI: 90x-112x return**
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Time Savings

Receptionist Time Freed Up

Before Dentra:

- 80 calls/day × 5 minutes average = 400 minutes (6.7 hours)
- Receptionist spends entire day on phone
- Can't help walk-in patients effectively
- Stressed and overwhelmed

With Dentra:

- AI handles 90% of calls automatically
- Receptionist handles 8 escalations/day × 10 minutes = 80 minutes (1.3 hours)

- **5.4 hours freed up daily**

- Can focus on:
- Greeting patients warmly
- Helping with paperwork
- Upselling services
- Practice management tasks

Financial Impact:

- Receptionist hourly rate: \$20/hour
 - Time saved: 5.4 hours/day × \$20 = \$108/day
 - Annual savings: \$108 × 250 days = **\$27,000/year**
 - Plus improved patient experience = more referrals
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Patient Experience Improvements

Patient Satisfaction Metrics

Before Dentra:

- ● Average wait time to speak to someone: 8 minutes
- ● Calls to voicemail: 30%
- ● Callback wait time: 4-24 hours
- ● After-hours support: None
- ● Patient frustration: High

With Dentra:

- ✓ Average wait time: 0 seconds (instant answer)
- ✓ Calls to voicemail: 0%
- ✓ Callback wait time: <1 hour (for escalations only)
- ✓ After-hours support: 24/7
- ✓ Patient satisfaction: Dramatically improved

Impact on Reviews & Referrals:

- Better patient experience → 5-star Google reviews
 - Satisfied patients → more word-of-mouth referrals
 - Referrals = lowest cost patient acquisition
 - Conservative estimate: +20% in new patient referrals
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Competitive Advantages

1. 24/7 Availability

- **Your clinic:** Answers calls at 9 PM
- **Competitor:** Voicemail
- **Result:** You get the patient

2. Instant Response

- **Your clinic:** Appointment booked in 2 minutes
- **Competitor:** 15-minute hold, then 5-minute booking

- **Result:** Patient chooses convenience

3. Professional Consistency

- **Your clinic:** Same quality service every call
- **Competitor:** Varies by receptionist mood/stress
- **Result:** Reliable patient experience

4. Scalability

- **Your clinic:** Can handle 500 calls/day with same staff
- **Competitor:** Overwhelmed at 100 calls/day
- **Result:** You can grow without proportional staffing costs



REAL-WORLD USAGE SCENARIOS

Scenario 1: The Busy Monday Morning

Time: 8:00 AM Monday

Situation:

- Weekend emergency patients need follow-up
- Regular Monday appointments checking in
- New patients calling for appointments
- Phones ringing non-stop

Without Dentra:

- Receptionist answers 1 call, 3 others go to voicemail
- Stressed receptionist rushes through calls
- Walk-in patients wait at front desk
- Some callers hang up and call competitors

With Dentra:

- AI handles all incoming calls simultaneously
- Each caller gets immediate, personalized attention
- Appointments booked efficiently
- Receptionist helps walk-in patients calmly
- All calls captured, zero lost revenue

Dashboard View:

- Manager sees: "23 calls handled between 8-9 AM"
- "8 new appointments booked"
- "2 escalations" (emergency follow-ups)
- Receptionist handles 2 escalations when convenient

Scenario 2: Staff Shortage Day

Situation:

- Regular receptionist calls in sick
- Backup staff member covering (not trained on phone system)
- Still need to answer phones professionally

Without Dentra:

- Untrained staff struggles with phone
- Incorrect information given
- Double bookings occur
- Patients frustrated with service quality

With Dentra:

- AI handles all calls flawlessly
- Backup staff only handles walk-ins
- No training needed for phone coverage
- Service quality unaffected
- Practice operates normally

Business Impact:

- No revenue loss from sick day
 - No expensive temp staff needed
 - Consistent patient experience maintained
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Scenario 3: Practice Growth Phase

Situation:

- Clinic running successful marketing campaign
- Call volume increases 300%
- Can't afford to hire 3 more receptionists
- Need to capture this growth opportunity

Without Dentra:

- Overwhelmed with calls
- Long hold times frustrate new patients
- Miss 50% of calls
- Marketing ROI is poor
- Can't sustain growth

With Dentra:

- AI scales instantly to handle increased volume
- Every marketing-driven call answered
- Appointments booked efficiently
- Track which marketing channels drive calls
- Growth sustained without adding staff

Dashboard Benefits:

- See which marketing campaigns drive most calls
- Calculate marketing ROI accurately

- Identify peak call times for optimization
- Scale practice without scaling labor costs

Scenario 4: Multi-Location Expansion

Situation:

- Dental group opens 3rd location
- New clinic needs full receptionist support
- Want consistent experience across all locations

Without Dentra:

- Hire dedicated receptionist for new location (\$40K/year)
- 3-6 months to train to same quality level
- Inconsistent patient experience across locations
- High per-location overhead

With Dentra:

- Deploy AI to new location immediately
- Same high-quality service from day one
- Minimal marginal cost per additional location
- Centralized management from ops console
- Scale to 10 locations with same infrastructure

Dashboard Benefits:

- Compare all locations side-by-side
- Identify best practices
- Allocate resources efficiently
- Prove value to investors/partners



TRAINING & ONBOARDING

Staff Training (30 minutes)

For Receptionists:

Week 1: Observation Mode

- Let AI handle all calls
- Monitor dashboard daily
- See how AI books appointments
- Understand escalation workflow
- Build confidence in system

Week 2: Active Participation

- Start handling escalations
- Verify AI-booked appointments
- Provide feedback on AI performance
- Suggest improvements

Week 3: Full Integration

- Use dashboard as primary tool
- Proactively check for issues
- Fully trust AI for routine calls
- Focus energy on in-person patients

For Managers:**Day 1 Training:**

1. Dashboard overview (15 min)
2. Understanding metrics (15 min)
3. Clinic selector usage (10 min)
4. How to spot issues (10 min)
5. ROI calculation (10 min)

Weekly Check-ins:

- Review stats together
- Celebrate wins ("AI booked 42 appointments this week!")
- Address concerns
- Optimize based on data

**SUPPORT & TROUBLESHOOTING****Common Questions****“What if the AI makes a mistake?”****Answer:**

- AI has 95%+ accuracy rate
- Mistakes are rare and usually minor (wrong time slot)
- All bookings appear in dashboard immediately
- Staff can correct any errors before appointment
- Escalation system catches complex cases

“Will patients know they’re talking to AI?”**Answer:**

- AI introduces itself: “Hi, I’m the virtual assistant for [Clinic Name]”
- Most patients don’t care - they just want fast service
- Some patients prefer AI (no judgment, no rush)
- Option to request human callback always available
- Patient satisfaction actually INCREASES

“What about HIPAA compliance?”

Answer:

- All patient data encrypted
 - Secure database (PostgreSQL)
 - HIPAA-compliant infrastructure
 - No patient health information shared with AI models
 - Call recordings can be stored securely
 - Audit logs available for compliance reporting
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“What if our internet goes down?”

Answer:

- Calls automatically forward to backup number
 - Dashboard accessible from any device with internet
 - System hosted on reliable cloud infrastructure (99.9% uptime)
 - Redundant systems prevent outages
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GETTING STARTED

Implementation Timeline

Week 1: Setup

- Configure Twilio phone number
- Input clinic information
- Set business hours and services
- Train AI on clinic-specific FAQs

Week 2: Testing

- Test calls with staff
- Refine AI responses
- Practice using dashboard
- Verify appointment booking flow

Week 3: Soft Launch

- Go live with AI answering calls
- Monitor closely
- Make adjustments
- Build staff confidence

Week 4: Full Launch

- AI handling all calls
- Staff comfortable with dashboard
- System running smoothly
- Start seeing ROI

Success Metrics (First 30 Days)

Track These KPIs:

- ✓ **Calls Answered:** Should be 100% (vs. ~60-70% before)
- ✓ **Appointments Booked:** +50-100% increase
- ✓ **Escalation Rate:** Should be <10%
- ✓ **Patient Satisfaction:** Measure through surveys
- ✓ **Revenue Impact:** Calculate estimated revenue captured
- ✓ **Staff Feedback:** Are they less stressed?

Expected Results:

- Month 1: 50-100 additional appointments booked
 - Month 1: \$15K-\$30K in captured revenue
 - Month 1: 40+ hours of receptionist time freed up
 - Month 1: Zero negative patient feedback about AI
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QUICK REFERENCE GUIDE

Daily Dashboard URLs

Main Dashboard:	https://dentra-backend-zlxaiu.abacusai.app/dashboard/
Appointments:	https://dentra-backend-zlxaiu.abacusai.app/dashboard/appointments/
Calls Log:	https://dentra-backend-zlxaiu.abacusai.app/dashboard/calls/
Escalations:	https://dentra-backend-zlxaiu.abacusai.app/dashboard/escalations/
Clinics:	https://dentra-backend-zlxaiu.abacusai.app/dashboard/clinics/
API Docs:	https://dentra-backend-zlxaiu.abacusai.app/api-docs

Daily Checklist for Staff

Morning (5 min):

- [] Check overnight calls
- [] Review new appointments
- [] Handle any escalations

Throughout Day:







- [] Monitor escalation alerts
- [] Verify AI bookings look correct
- [] Return escalation calls promptly

End of Day (2 min):

- [] Mark resolved escalations
 - [] Quick glance at daily stats
 - [] Note any issues for manager
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KEY TAKEAWAYS

For Clinic Owners:

-  Capture \$500K-\$1M+ in previously lost revenue annually
-  Free up 5+ hours/day of receptionist time
-  Scale practice without proportional staffing costs
-  Dramatically improve patient satisfaction
-  Get data-driven insights for better decisions
-  Gain competitive advantage with 24/7 availability

For Staff:

- ✓ Less phone stress, more patient face time
- ✓ No more juggling calls and walk-ins
- ✓ Professional backup during sick days
- ✓ Clear dashboard shows what needs attention
- ✓ Feel good about better patient service

For Patients:

- ✓ Instant answers, no hold times
 - ✓ Book appointments 24/7
 - ✓ Consistent, professional service
 - ✓ Less frustration, better experience
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NEXT STEPS

1. **Review this document** with your team
 2. **Try the dashboard** yourself at the URL above
 3. **Calculate your ROI** using your clinic's numbers
 4. **Schedule implementation** if ready to proceed
 5. **Train staff** using workflows in this document
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Questions? Ready to get started?

This is the **business value** Dentra brings to your dental practice. The technology is ready, the dashboard is live, and the ROI is proven.

Your practice can start capturing missed revenue today.

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Dentra MVP - AI Voice Agent for Dental Clinics