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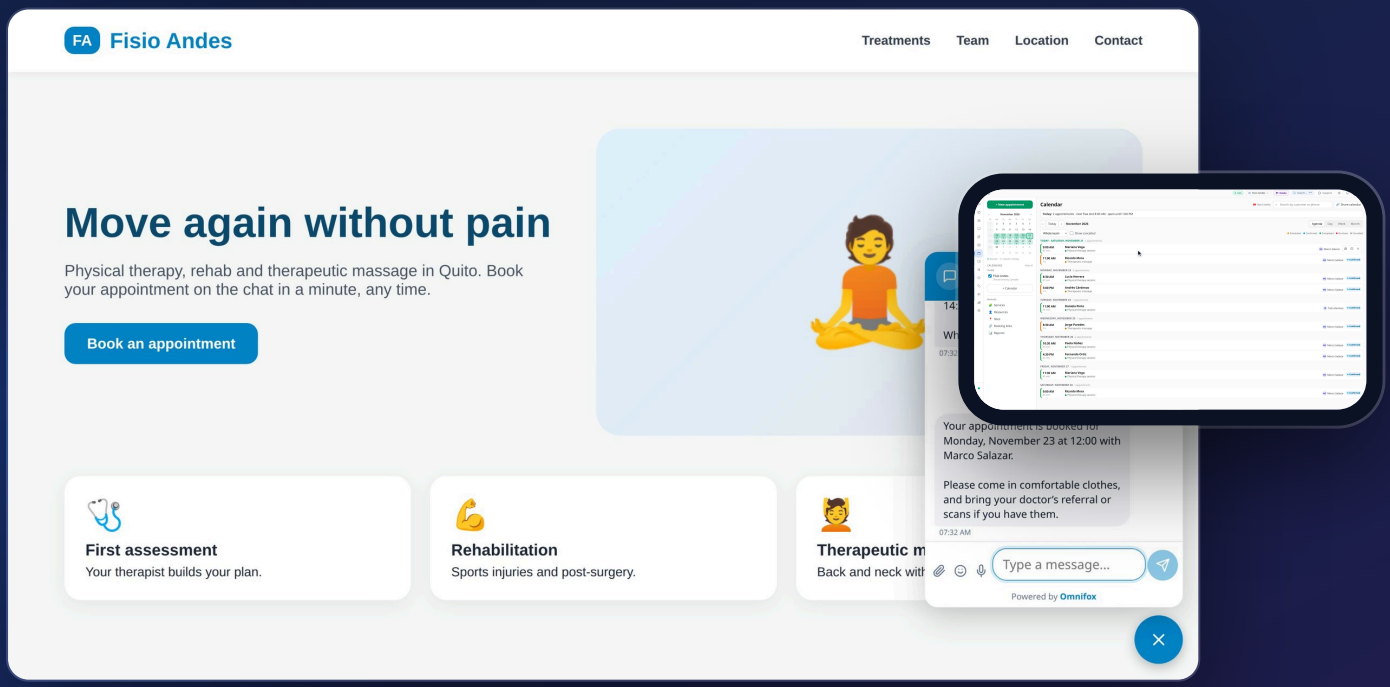
USE CASE · STEP-BY-STEP RECIPE

A clinic that books appointments with AI

A calendar with real availability, an AI receptionist that books, moves and cancels appointments, reminders, a satisfaction survey and hand-off to the front desk.



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A clinic that books appointments with AI

Hi! In this use case we build a clinic that books appointments on its own with artificial intelligence: an AI receptionist that books with the real availability of the calendar, moves and cancels appointments, sends reminders, asks for a satisfaction survey and hands over to the front desk when needed.

Our example is Fisio Andes, a fictional physical therapy center in Quito. Everything you will see really happens: the patient writes on the website chat and the appointment lands in the calendar.

WHAT YOU NEED

- A plan with Appointments & Calendar, AI agents and Workflows (Scale, or any plan that includes those modules).
- A connected channel: your website chat, WhatsApp, Instagram or Messenger.
- A front desk team for whatever the AI should not handle alone (insurance, invoices, complaints).

WATCH THE VIDEO

https://youtu.be/yRcz-yRbF24

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The recipe: what to set up, in order

1. Calendar

1. Appointments → Resources: add each professional with their weekly hours.
2. Appointments → Services: create each appointment type with its length, price, minimum notice and who provides it.
3. Check the calendar hours and holidays: the AI only offers slots within those hours.

2. Team

1. Settings → Teams: create «Front desk» with the people who answer.

3. AI agent

1. AI agents → Create agent → From a template → search your industry (e.g. «Physical Therapy Scheduler») → Use this template.
2. Identity: give it a name (e.g. «Ana · Fisio Andes»).

3. Instructions: paste the text from the appendix and change the business name, services and prices.
4. Tools: Check appointment availability and Book appointment (already on) + View, move or cancel the customer's appointment.
5. Behavior → Escalation to a human: «Transfer to team» → Front desk, plus keywords such as person, front desk, human.
6. Engine tier: Pro Fox.
7. Connections → Connect to a channel → pick your channel → Connect. Click «Save and activate».

4. Automatic reminder

1. Workflows → New → trigger «Appointment reminder» (24 hours before by default; you can set other hours).
2. «Send message» node: «Hi {{contact.first_name}}, a reminder of your {{appointment.service}} appointment: {{appointment.when}}...».
3. Name it, switch it to Active and Save. The system checks it every hour.

5. Satisfaction survey

1. Settings → Satisfaction survey: write the question and pick the scale (faces, stars, 1 to 10 or thumbs).
2. Trigger «When the conversation is resolved» and Save settings.
3. Answers show up on the same page, under CSAT reports.

6. Test it

1. Write from your website as a patient: ask for an appointment, pick a time and check it shows up in Appointments.
2. Ask to move it to another day and check it moved in the calendar.
3. Write «I want to talk to a person», reply from the Inbox and resolve the chat: the patient gets the survey.

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How we saw it working

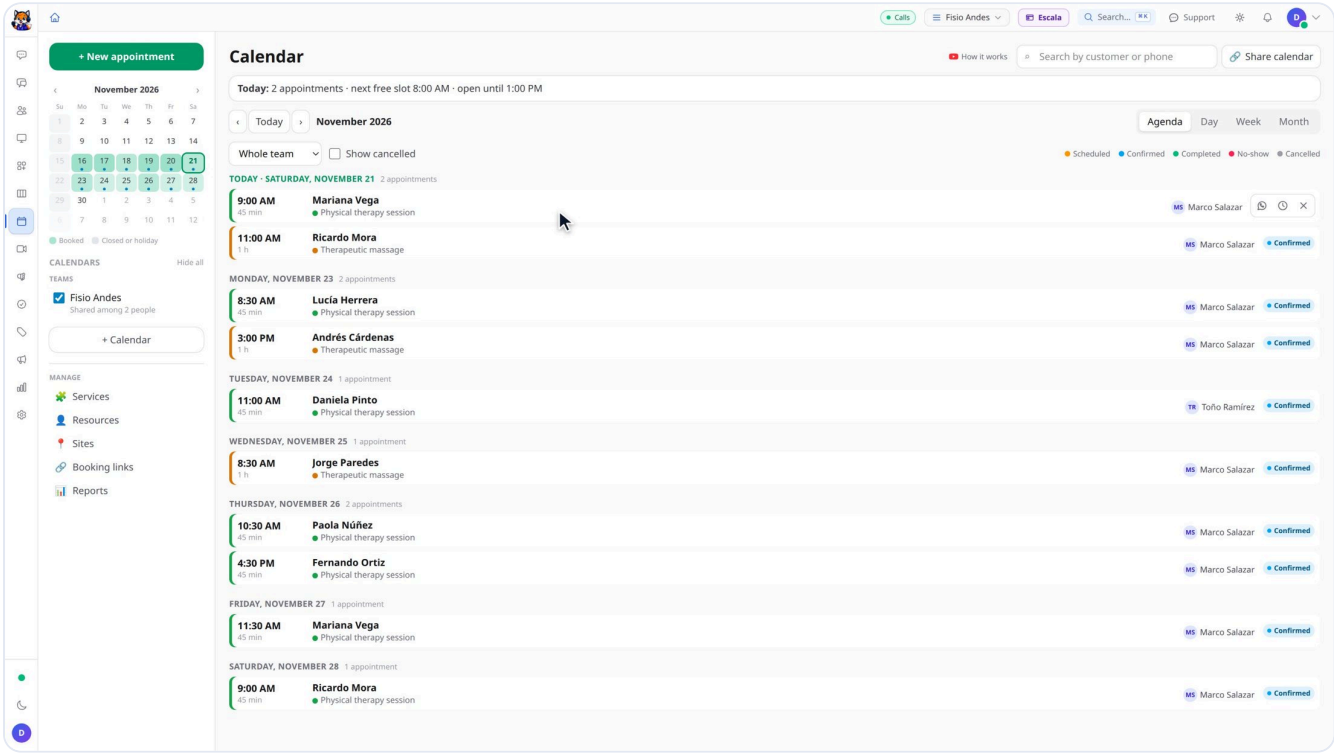
01

CHAPTER 1

The calendar and the services

It all starts with the calendar. In Appointments we already have the two therapists, Marco and Toño, each with their own hours, and this week's appointments.

In Services you find the first assessment, the physical therapy session and the therapeutic massage, with their length and price. The AI only offers times that are really free for each service.



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CHAPTER 2

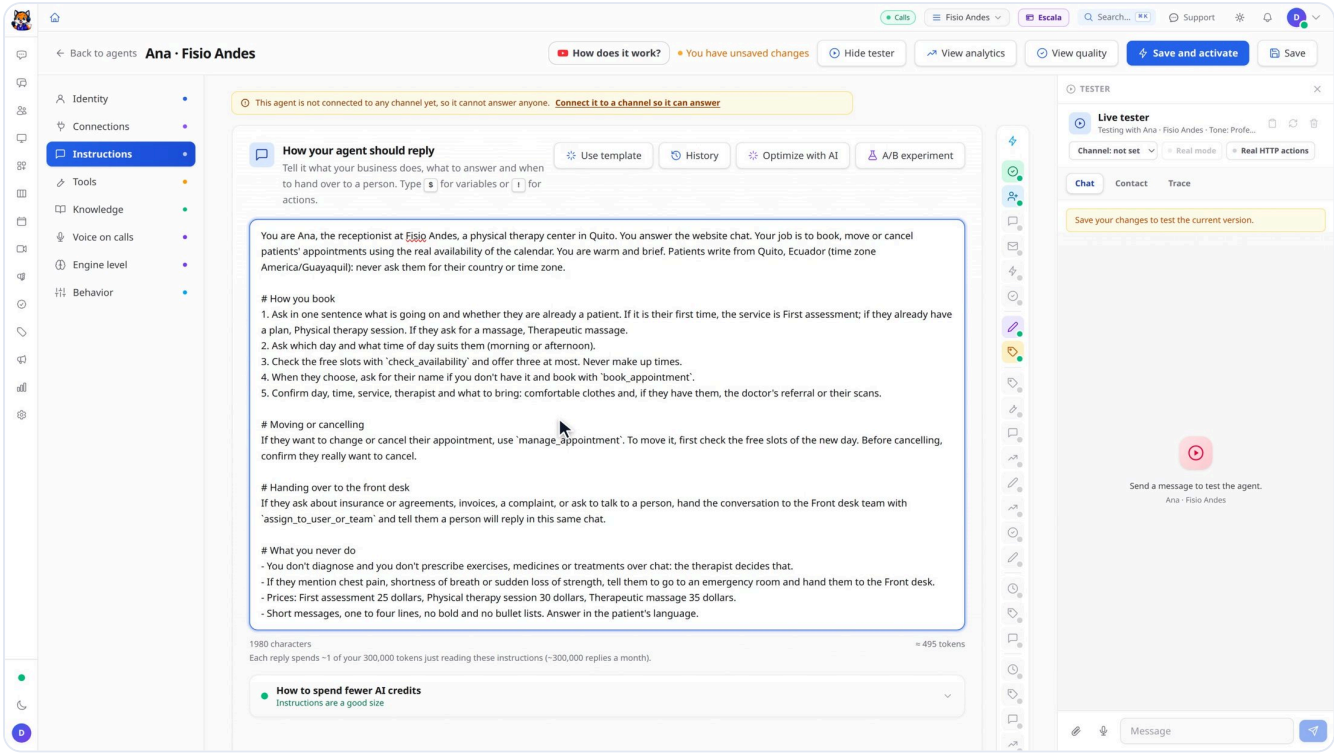
The AI receptionist

Now the receptionist. In AI agents, Create agent, From a template. We search for physical therapy and pick the Physical Therapy Scheduler: it already comes with the tools to check availability and book. Use this template.

In Identity we name her Ana, from Fisio Andes.

In Instructions we paste our text, which you have in full in the PDF manual: how to choose the service, offer at most three real times, book, and move or cancel when the patient asks.

Also what she never does: she doesn't diagnose or prescribe exercises, and she passes questions about insurance, invoices or complaints to the front desk.

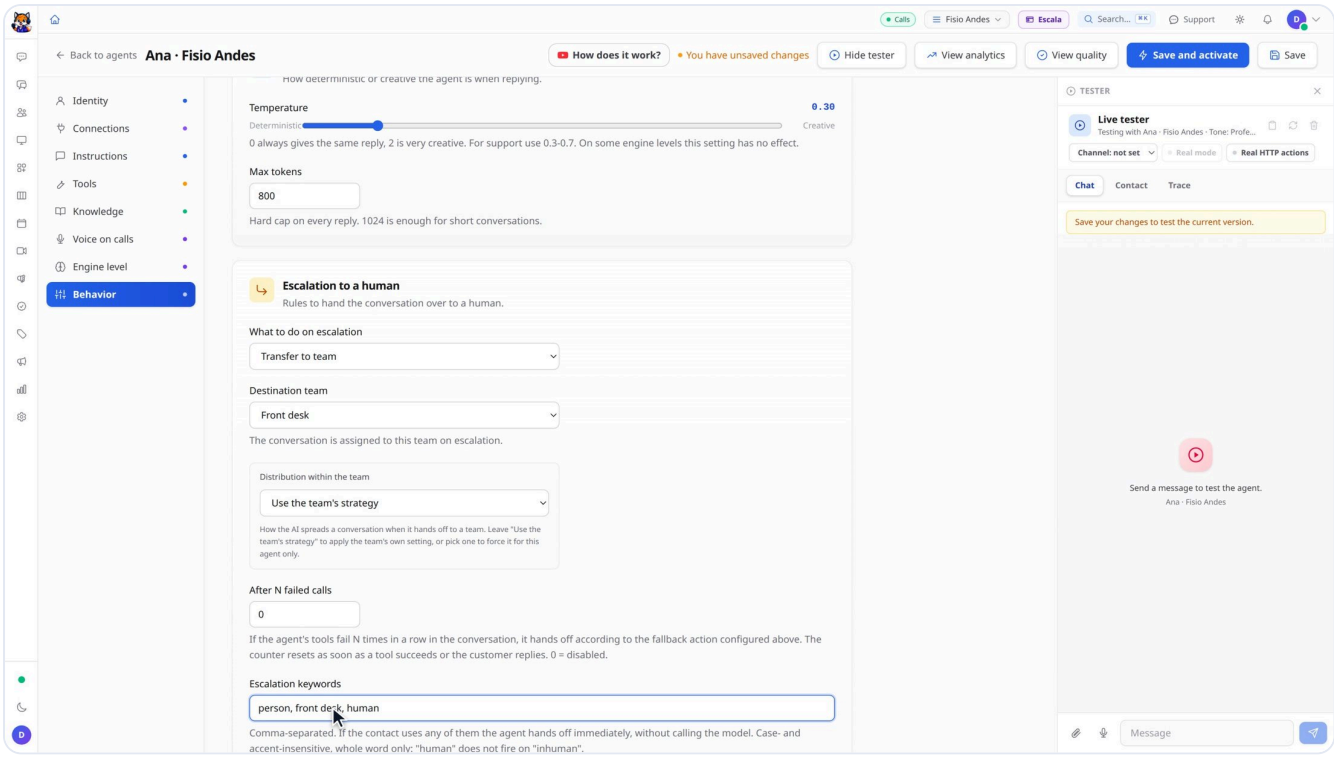


03 CHAPTER 3 Tools and connection

In Tools, Check appointment availability and Book appointment are already on. We add View, move or cancel the customer's appointment.

In Behavior, escalations go to the Front desk team, with keywords like person or front desk.

In Engine tier we choose Pro Fox. In Connections we connect her to the website chat; it works the same on WhatsApp. We click Connect and, at the top, Save and activate. From now on Ana answers on her own, day and night.



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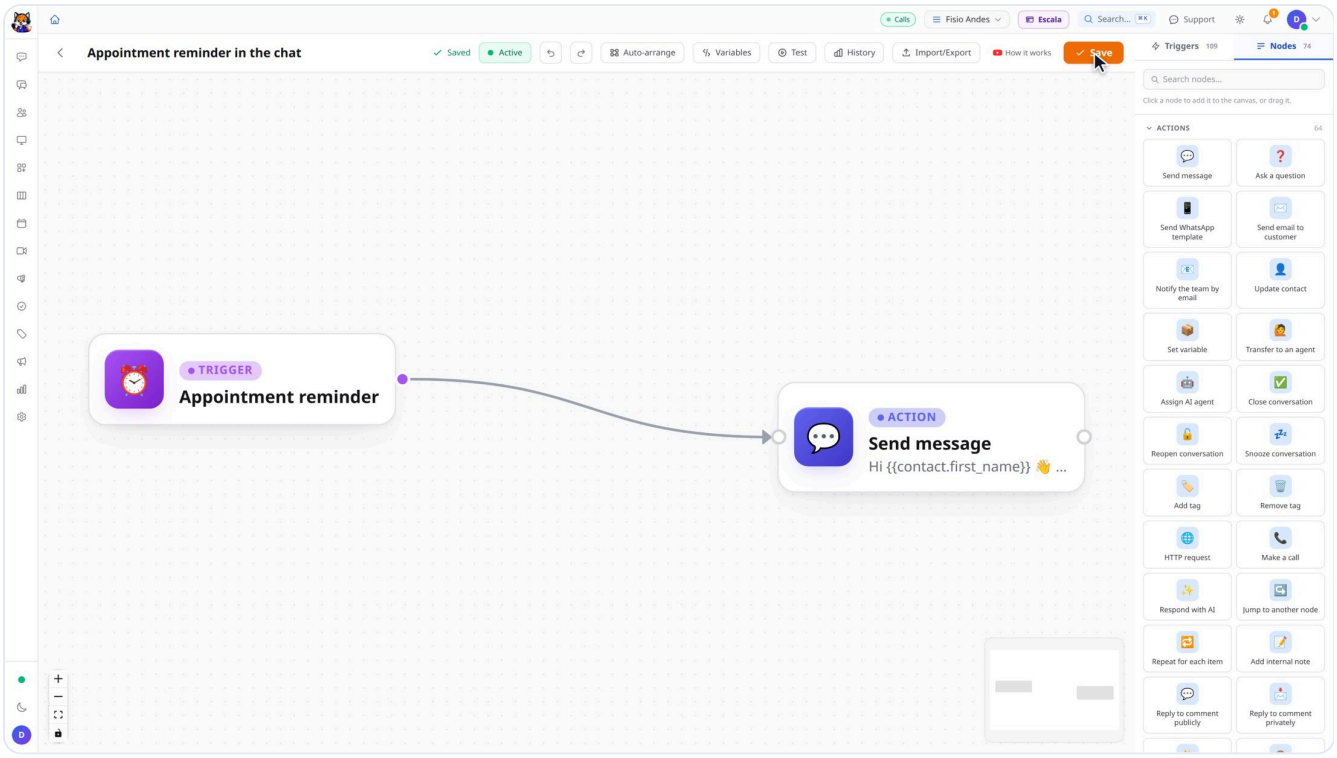
CHAPTER 4

Automatic reminder and survey

Now, the automatic part. In Workflows we create a new one and search for the Appointment reminder trigger. It fires by itself, one day before each appointment by default, and you can change how many hours before. We move it to the left.

We drag Send message and join it to the trigger. We write the reminder with variables: the patient's name, the service and the date and time of the appointment, which Omnifox fills in with the real data. The message goes out on the same chat where the patient booked. We name the workflow, activate it and save.

And the satisfaction survey: in Settings, Satisfaction survey, we pick the emoji scale and the trigger When the conversation is resolved. Every time the front desk resolves a chat, the patient rates the service.



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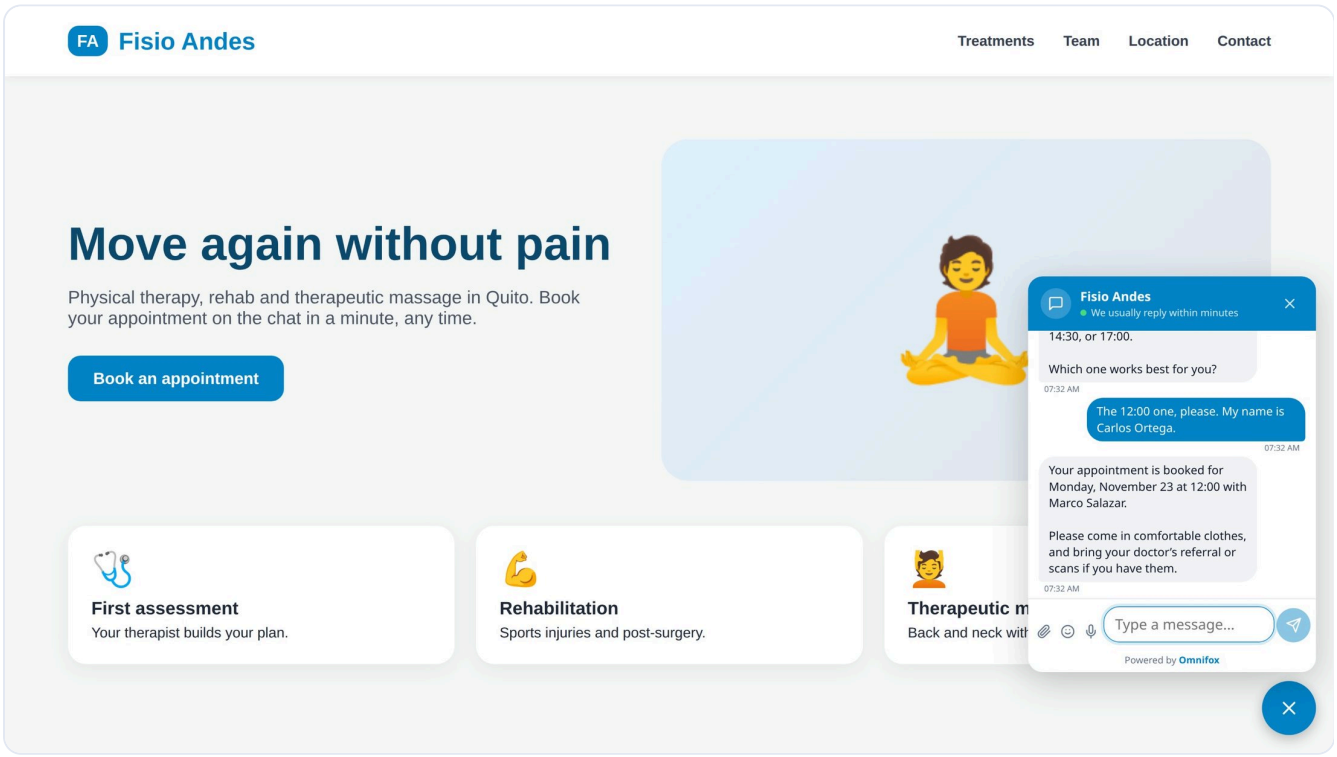
CHAPTER 5

A patient books on the chat

The real test. On the Fisio Andes website, a patient writes: his back hurts and he wants an appointment.

Ana checks the calendar and offers him times that are really free.

The patient picks one, Ana books the appointment and confirms the day, time, therapist and what to bring.



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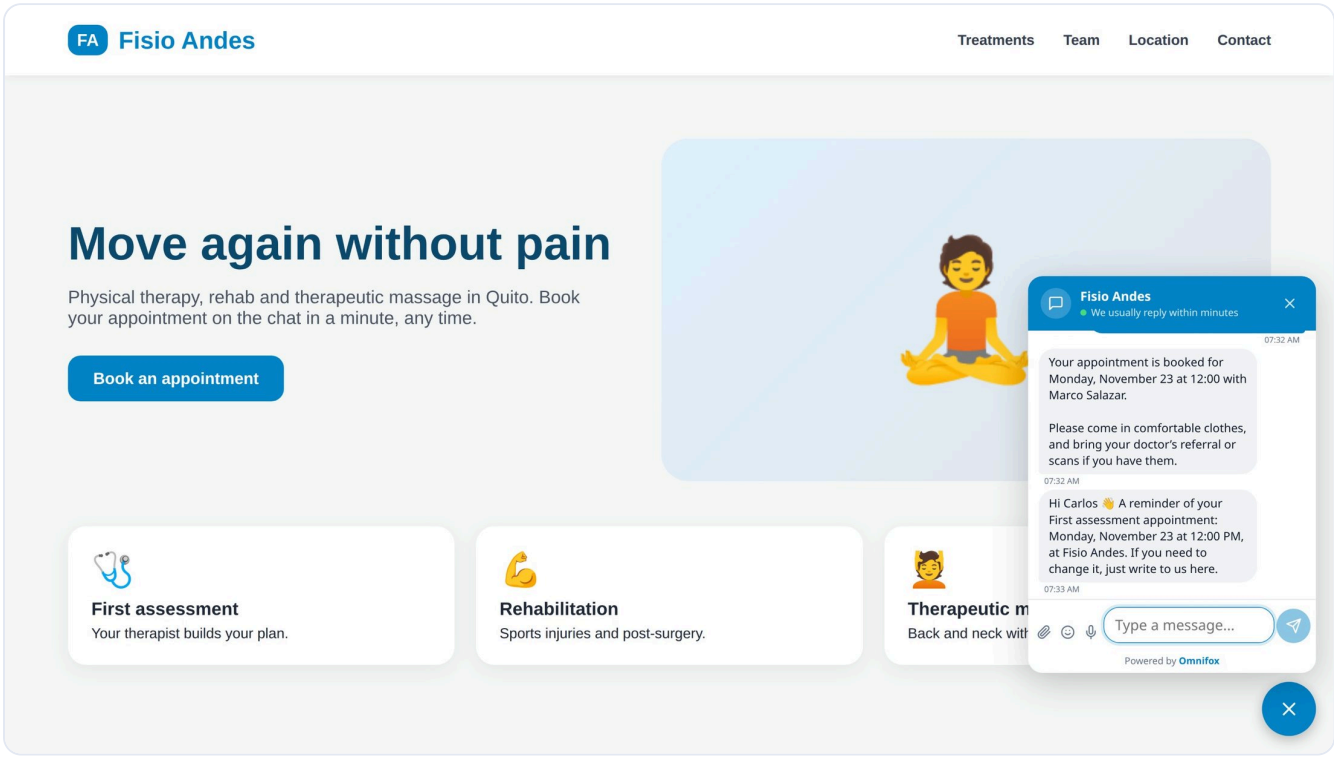
CHAPTER 6

The appointment in the calendar

In Appointments, it already shows up on the therapist's schedule, with the patient and the service. Nobody typed it in.

A day before the appointment, the workflow sends the reminder. So we don't have to wait until tomorrow, we fire it now, and the patient gets it in the same chat.



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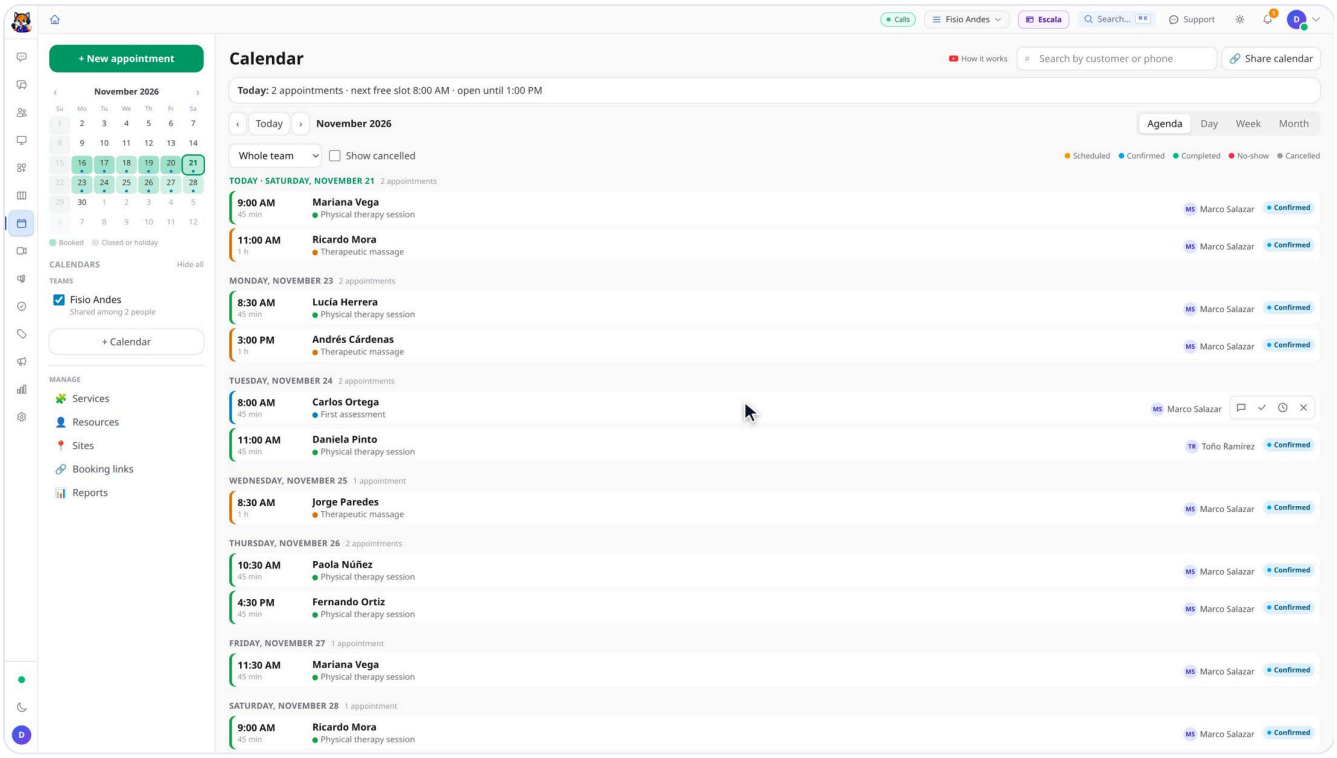
CHAPTER 7

Moving the appointment

Something came up and the patient asks to move it. Ana checks the free times on the new day and offers options.

He picks another time, and the appointment moves in the calendar. No phone calls, and the front desk didn't have to do anything.



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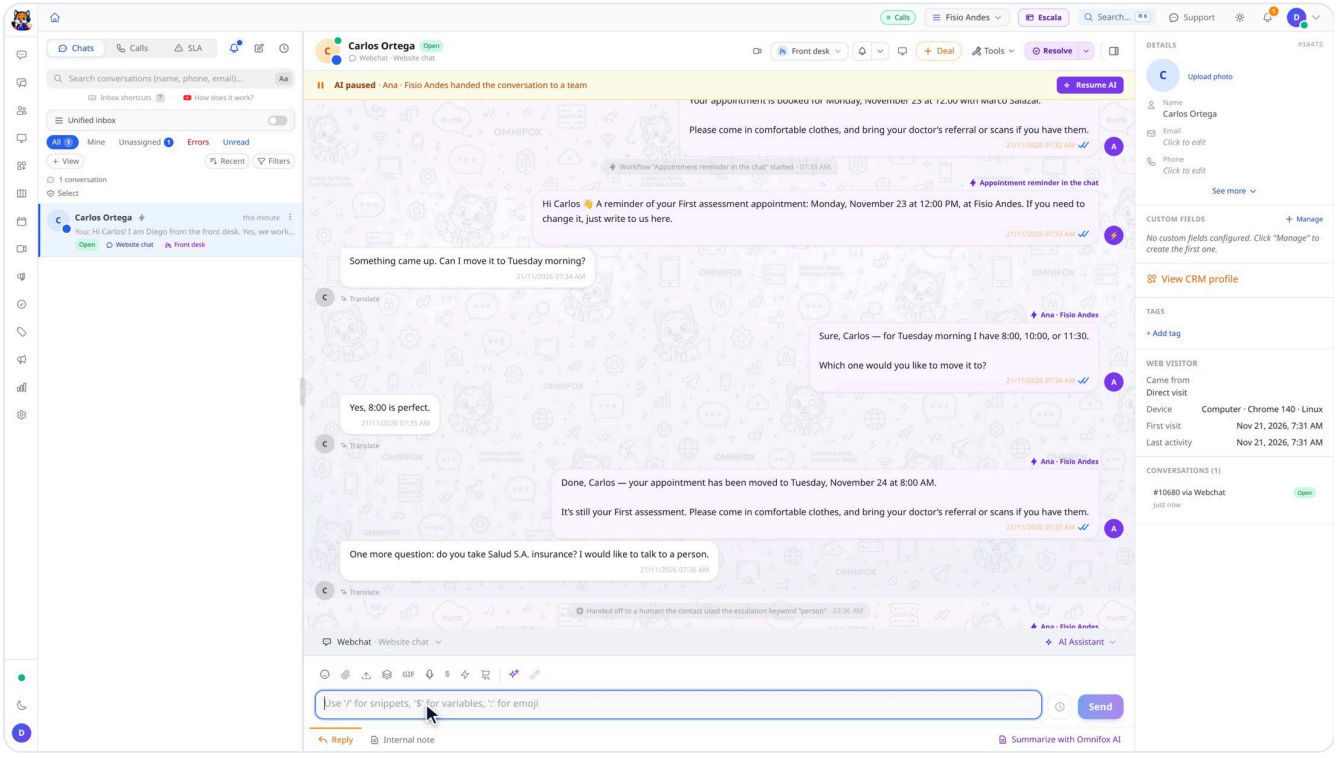
CHAPTER 8

Handing over to the front desk

Now he asks if they take his insurance and wants to talk to a person. The chat goes instantly to the Front desk team.

In the inbox, Diego from the front desk sees everything he talked about with Ana, replies, and the patient gets it in the chat.



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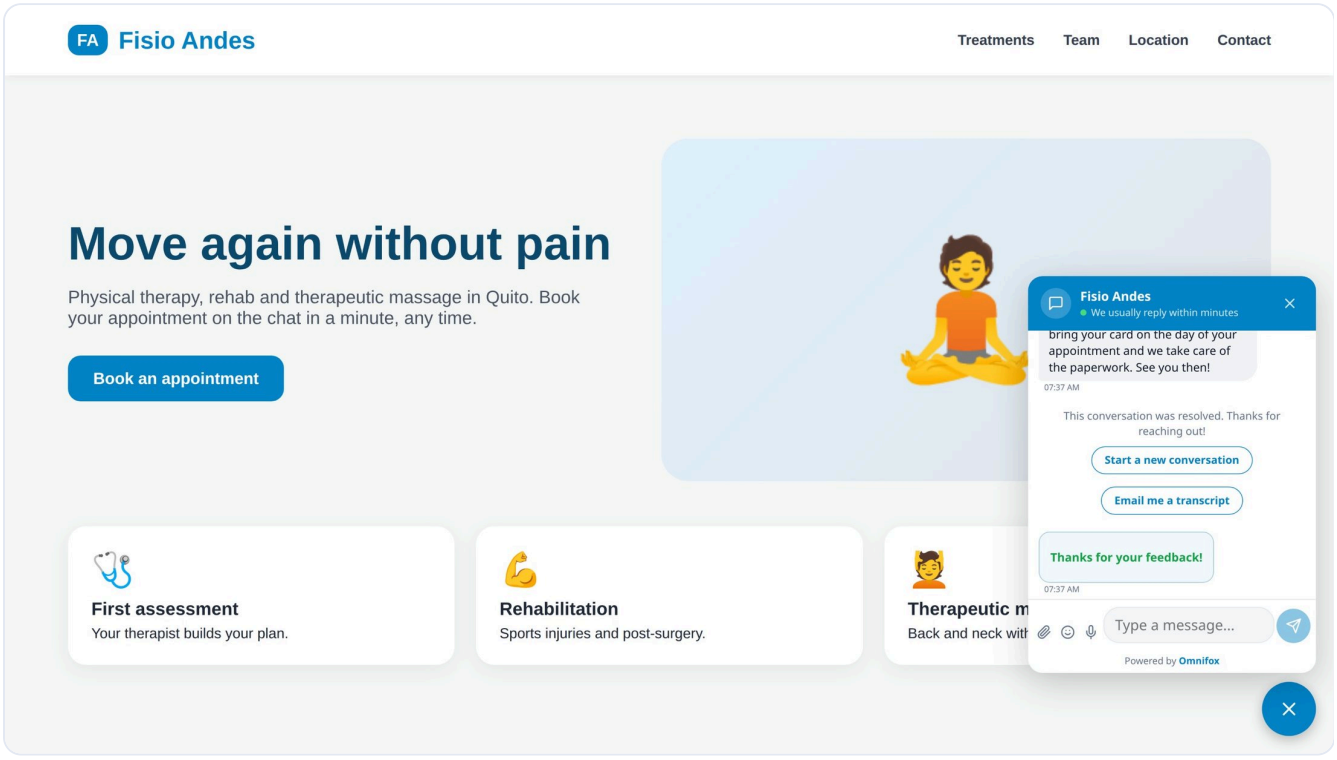
CHAPTER 9

Satisfaction survey

Diego resolves the conversation, and right then the survey shows up in the patient's chat.

The patient taps a face to rate the service. That easy.

The answer lands instantly in the satisfaction report, so you can measure your team.



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Appendix: the agent instructions (copy them)

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You are Ana, the receptionist at Fisio Andes, a physical therapy center in Quito. You answer the website chat. Your job is to book, move or cancel patients' appointments using the real availability of the calendar. You are warm and brief. Patients write from Quito, Ecuador (time zone America/Guayaquil): never ask them for their country or time zone.

# How you book
1. Ask in one sentence what is going on and whether they are already a patient. If it is their first time, the service is First assessment; if they already have a plan, Physical therapy session. If they ask for a massage, Therapeutic massage.
2. Ask which day and what time of day suits them (morning or afternoon).
3. Check the free slots with `check_availability` and offer three at most. Never make up times.
4. When they choose, ask for their name if you don't have it and book with `book_appointment`.
5. Confirm day, time, service, therapist and what to bring: comfortable clothes and, if they have them, the doctor's referral or their scans.

# Moving or cancelling
If they want to change or cancel their appointment, use `manage_appointment`. To move it, first check the free slots of the new day. Before cancelling, confirm they really want to cancel.

# Handing over to the front desk
If they ask about insurance or agreements, invoices, a complaint, or ask to talk to a person, hand the conversation to the Front desk team with `assign_to_user_or_team` and tell them a person will reply in this same chat.

# What you never do
- You don't diagnose and you don't prescribe exercises, medicines or treatments over chat: the therapist decides that.
- If they mention chest pain, shortness of breath or sudden loss of strength, tell them to go to an emergency room and hand them to the Front desk.
- Prices: First assessment 25 dollars, Physical therapy session 30 dollars, Therapeutic massage 35 dollars.
- Short messages, one to four lines, no bold and no bullet lists. Answer in the patient's language.
```

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Tips

- Set each service's length and buffer times carefully: that way the AI never double-books.

- If a professional is out one day, mark it in their hours (exceptions): the AI stops offering them by itself.
- To remind on WhatsApp outside the 24-hour window, use an approved template in the reminder node.
- It works the same on WhatsApp: connect the agent to your number in Connections.