DENTAL ADMIN GUIDE

Configure the practice.
Publish with confidence.
Keep patient work private.

Screen-by-screen instructions for the grouped workspace, native practice tools and public website publishing.

Admin: dentaladmin.savija.io
Public website: dental.savija.io

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Start here: your setup route

A reliable first setup takes you from practice details to a tested public booking journey.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
1. Practice setup	Enter the real name, contact details, time zone and opening hours.
2. Locations and team	Create locations, then provider profiles and location assignments.
3. Services & booking	Create active services, set durations and enable patient booking deliberately.
4. Connections	Configure your own provider credentials and optional calendar OAuth.
5. Website content	Publish pages, FAQs, sections, gallery images, navigation and brand settings.
6. Patient workflow	Test registration, verification, intake, insurance and appointment ownership.
7. Pilot and review	Check saved appointments, staff requests, delivery and cancellation behavior.

HOW TO USE THIS SCREEN

1. Use the admin root URL: https://dentaladmin.savija.io/. The /admin path belongs to the preserved console.
2. Complete the steps in the order above. Save one screen at a time, then inspect the corresponding public page.
3. Use fictional names and example.test addresses in a staging environment. Do not publish demo providers as real clinicians.

VERIFY THE RESULT

Open https://dental.savija.io/ in a private browser window. Confirm the correct practice, services and providers before sending real patient traffic.

IMPORTANT

Each Dental deployment is independent of Spa, Consulting and Product. Never copy another app's .env, encryption key, database or media storage into Dental.

Sign in, roles and account recovery

Access & history / Users; Front desk / Security. Authentication protects private staff information.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Email	Use the existing individual staff email. The initial email is DENTAL_ADMIN_EMAIL in Dental/.env.
Password	Use the current account password. The initial value may be DENTAL_ADMIN_PASSWORD; it can become stale after a reset.
Authenticator code	Leave blank unless MFA is enabled. Then enter a fresh six-digit code.
Staff role	Reads permitted records and front desk work. Native practice, calendar, team, service and connection settings require admin.
Admin / super admin	Configure practice and website data. Super admin can assign the super-admin role.

HOW TO USE THIS SCREEN

1. Open the admin root and sign in. Do not send passwords or screenshots containing .env values to other people.
2. Under Front desk > Security, enter your current password, generate an authenticator secret, store it privately and verify a code. Enrollment signs existing workspace sessions out.
3. For a lost password, an authorized VPS operator runs: docker compose exec dental-api python -m packages.api.recover_admin. Choose PASSWORD and follow the prompts.

VERIFY THE RESULT

Sign out and back in. An MFA-enabled account must require a fresh code. A staff account should not see admin-only practice setup screens.

IMPORTANT

Changing .env alone does not reset an existing database password for an admin user. Lost-authenticator recovery uses the same host command with MFA; protect VPS shell access.

The grouped workspace menu

The sidebar uses functional groups, icons and collapsible headings, following your reference layout.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Workspace	Overview.
Front desk	Front desk operations and Calendar & appointments.
Patients	Patient care, Patient Portal and administrative patient/notes/document/treatment records.
Website content	Pages, Sections, Blog, FAQs, Testimonials, Gallery, Media, Navigation, Settings and Insurance.
Practice setup	Practice settings, Team & availability, Services & booking, Locations, Rooms and AI, voice & connections.
Access & history	Users and Audit, visible to administrators.

HOW TO USE THIS SCREEN

1. Select a group heading to collapse or expand it. Use Find a section to filter all menu items.
2. Choose a section to stay within the new interface. The address includes a fragment such as /#services; refreshing keeps the section selected.
3. On a phone, open Menu, select a screen and use the same controls. The menu closes after selection.

VERIFY THE RESULT

Calendar, Team, Practice and Connections should render within the same header and sidebar. There should be no Original console shortcut in the sidebar.

IMPORTANT

Google and Microsoft consent pages are expected external screens. Their successful callback returns to /#connections, not the old team page.

Overview and what its numbers mean

Workspace / Overview provides a content summary, not a financial or clinical performance report.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Records	Count of workspace records across the configured CMS and administrative modules.
Published pages	The inherited overview counts page records; use the Pages status filter to verify what is actually published.
Order requests / order value	Inherited product-oriented counters. They are not Dental revenue and are not payment receipts.
Workspace activity	Counts by module, not a timeline of patient attendance or completed visits.
Front desk outcomes	Actual request status counts and overdue callbacks, excluding marked demo enquiries.

HOW TO USE THIS SCREEN

1. Use Overview as a quick inventory of records. Open the underlying module before drawing conclusions about publication.
2. For callbacks, open Front desk > Outcomes instead of using content counts.
3. For appointments, use Calendar & appointments; do not infer appointment volume from CMS records.

VERIFY THE RESULT

A newly saved page should appear in Pages and the content inventory. A completed callback should change Front desk outcomes.

IMPORTANT

This release does not synthesize revenue, conversion, latency, no-show or savings metrics. Those require authoritative events and provider data.

Practice settings: profile and contact

Practice setup / Practice settings. These are operational practice facts, separate from marketing copy.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Practice name	Example: Example Dental Care. Keep the public-name synchronization checkbox selected to update the website header name.
Practice address / public phone	Enter the real visitor address and a callable number with country code where possible.
Contact email	Enter the monitored public practice address, for example reception@example.test in staging.
Practice time zone	Use an IANA value such as America/New_York. Never enter EST or a numeric offset here.
Tagline / about	Public practice background displayed on the About page. The home hero uses Website content > Settings instead.
Sync public name	Updates the published name setting in the same save. It does not replace page bodies, FAQs or other hero copy.

HOW TO USE THIS SCREEN

1. Enter the profile fields. Check spelling and contact details against your practice's approved information.
2. Keep Also update the public website name selected when the same name should appear in the website header.
3. Review Working hours and Appointment rules further down this screen, then select Save practice settings.

VERIFY THE RESULT

Refresh the public header, /contact and /about. A configured Twilio From number takes precedence over the profile phone in the public clinic snapshot.

IMPORTANT

If another user saves first, a changed-record message prevents overwriting their work. Reload, review the newer values and save again.

Practice settings: hours and booking rules

The same screen controls when the scheduling engine may offer appointments.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Closed checkbox	Select for days the office is closed. Open and close inputs are then disabled.
Opens / closes	Use local 24-hour times. Example: Monday 09:00 to 17:00. Closing must be after opening.
Lunch starts / ends	Optional daily closure. Enter both times, for example 12:00 and 13:00, or leave both blank.
First / last appointment start	Optional restrictions inside working hours. Last start is not the office closing time.
Default duration	Fallback duration in minutes when a service does not supply one. Native booking requires a service with its own duration.
Start interval	Spacing between offered starts, for example 15 or 30 minutes. This is different from visit length.

HOW TO USE THIS SCREEN

1. Set each weekday explicitly; do not leave a previously open day unchecked by accident.
2. Choose service durations and intervals together. A 60-minute service cannot fit in a 30-minute gap.
3. Save, then check a real offered date on /book. Connected calendar busy periods and existing appointments can remove otherwise valid starts.

VERIFY THE RESULT

Closed days, lunch and unavailable periods must not offer appointments. Use the practice time zone shown on the booking page.

IMPORTANT

Per-provider custom working-hour editors, holiday exceptions and room/chair capacity enforcement are not added by this screen. External calendar busy time can block individual providers.

Locations and room records

Practice setup / Locations manages public locations. Rooms is a separate administrative inventory.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Name	A patient-recognizable label, for example Main office.
Address / phone	Public facts for this location. Do not put private access codes here.
Calendar color	Choose a six-digit color using the picker. This stores location metadata.
Active location	Controls inclusion in the public clinic location list and choices for new assignments.
Provider assignment	Open Team & availability and select the provider's assigned locations.
Rooms module	Stores title/body inventory records; it does not create a scheduling resource or enforce chair capacity.

HOW TO USE THIS SCREEN

1. Select Add location, enter the fields and save.
2. Open each provider and choose the appropriate assigned locations.
3. To retire a site, edit it and clear Active location. Review existing provider assignments and scheduled appointments separately.

VERIFY THE RESULT

The active location should appear on /contact. A staff appointment using an explicit location must select one assigned to its provider.

IMPORTANT

Location records are not role-based access groups. Deactivating a location does not automatically cancel appointments or remove past records.

Team & availability: provider profiles

Practice setup / Team & availability. Provider profiles are public; account permissions are managed elsewhere.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Name	Public clinician or provider name. Example: Dr Avery Example in staging.
Provider email / phone	Operational contact fields; do not use them as proof of patient identity.
Professional title / specialty	Example: Dentist / General dentistry. Use approved credentials and descriptions.
Public biography	Plain-text profile shown on /doctors. Avoid unsupported qualifications or claims.
Assigned locations	Choose existing locations. Assignment is required when an appointment explicitly selects a site.
Calendar connection	Managed in AI, voice & connections. Provider availability combines practice hours, bookings and connected calendars.

HOW TO USE THIS SCREEN

1. Select Add provider. Enter the profile and choose locations, then save.
2. Use Edit next to an existing provider to update their public details.
3. Open AI, voice & connections to authorize that provider's Google or Microsoft calendar when needed.

VERIFY THE RESULT

Open /doctors and confirm the name, title, specialty and biography. Open /book and check that the provider appears in the selector.

IMPORTANT

A provider record does not create a staff login. Use Access & history > Users for staff accounts. This release does not add a provider deletion button because existing appointments may reference the profile.

Services & booking: what patients can select

Practice setup / Services & booking. Active and patient-bookable are separate controls.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Name / public description	Describe the approved treatment or visit type, for example Routine examination.
Duration	Whole minutes, 5 to 480. Example: 30. This controls the requested appointment length.
Price in cents	Optional integer: 12500 means $125.00. Blank means contact the practice, not a zero-dollar price.
Active service	Includes the service in public care information. Inactive services are excluded from public booking.
Patients can book	Explicit opt-in for the public /book appointment-type list and patient booking APIs.
Service ID	A saved service has an internal ID. Do not paste a CMS treatment record ID into scheduling fields.

HOW TO USE THIS SCREEN

1. Select Add service, enter the fields, choose Active service and deliberately enable Patients can book where appropriate.
2. Save. Edit the record later to change duration, price or booking permission.
3. To withdraw a service, clear patient booking or deactivate it. Existing appointments are not automatically cancelled.

VERIFY THE RESULT

Check /services for the public name, description, duration and price. Check /book for the allowed service. If the appointment-type selector is disabled, no active service is opted in.

IMPORTANT

Patient Portal contains the same patient-booking permission. Changing it there or here affects the same saved flag. Services should describe approved clinical offerings; the software does not validate treatment suitability.

Calendar: read a day or week

Front desk / Calendar & appointments stays inside the new admin workspace.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Starting date	First local date included in the view.
View	Day or Week. Previous and Next move by the selected view span.
Provider filter	Restricts displayed appointment cards to the chosen provider.
Appointment card	Shows patient name, service, provider, local start/end, status and external calendar event state.
External busy time	Shown without external event titles or patient details; edit the original event in its own calendar.
Saved locally	A real practice booking exists, but no external event ID is recorded. Review Connections if an external calendar was expected.

HOW TO USE THIS SCREEN

1. Select the correct starting date and view. Confirm the time zone printed above the appointment cards.
2. Use the provider filter when reviewing one clinician's workload.
3. Review pending, confirmed and cancelled statuses before contacting a patient. The calendar contains private information.

VERIFY THE RESULT

A saved test appointment should appear in the correct date range. A blank view can mean no records in that range, not a broken connection.

IMPORTANT

This release presents appointment cards rather than drag-and-drop calendar editing. Large views are capped at 500 bookings and 500 independent busy events per request; narrow the range for busy practices.

Calendar: add an appointment

Front desk / Calendar & appointments > Add appointment. This is a staff booking, not a patient identity-verification flow.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Provider / service	Choose a provider and active service from this practice.
Location	Optional provider default, or a location already assigned to that provider.
Patient name / email or phone	Collect only the contact information needed for the visit and communication.
Start date and time	Entered in the practice time zone printed on the form, regardless of the browser's time zone.
Administrative note	Optional short note. It may be mirrored to the provider calendar; avoid unnecessary clinical detail.
Create appointment	Rechecks offered availability and saves through the existing scheduling service.

HOW TO USE THIS SCREEN

1. Choose provider, service and location. Confirm the patient's name and contact details with them.
2. Enter a future time in the practice time zone. The backend rejects a start it does not currently offer.
3. Select Create appointment once. Wait for success, then locate the saved appointment in the calendar.

VERIFY THE RESULT

Confirmation requires a saved appointment returned by the API. Check the real appointment card rather than relying on an assistant's words.

IMPORTANT

A staff booking does not automatically appear in a patient portal. Link it under Patient Portal after confirming identity. Ambiguous or missing daylight-saving times are rejected; choose a clear valid time.

Calendar: reschedule, cancel and link

Changes use the same practice scheduler and permission checks as other appointment operations.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Reschedule	Open an active appointment card, choose Reschedule and enter the new local practice time.
Cancel appointment	Requires confirmation. Frees the time and can trigger configured cancellation or waitlist behavior.
Pending verification	A hold is not the same as a confirmed visit. Review status before making promises.
Patient Portal link	Links a saved staff appointment to a verified patient account after staff review.
Unlink	Removes portal visibility without cancelling the underlying appointment.

HOW TO USE THIS SCREEN

1. For a move, confirm the new offered start and save. Re-open the calendar to verify the new date/time.
2. For cancellation, review the patient and visit, then confirm the action. Review delivery if the practice expects a notification.
3. For portal visibility, open Patient Portal > Link staff appointments to patients. Use contact suggestions or a known appointment ID, confirm ownership and link.

VERIFY THE RESULT

A rescheduled visit should appear once at the new time. A cancelled appointment should have cancelled status. Only the intended patient should see a linked booking.

IMPORTANT

Native staff scheduling is an administrative action; the patient cancellation-notice rule is enforced on patient portal changes. Do not treat a contact match alone as verified ownership.

AI, voice & connections: modes

Practice setup / AI, voice & connections replaces the old connections shortcut.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Automatic selection	Uses the available configured chat backend. Inspect the effective backend indicator.
OpenAI API	Requires the app's saved OpenAI API key and approved model configuration.
n8n workflow	Requires a complete configured webhook URL. Review workflow behavior and permissions outside this UI.
Server CLI	Requires an operator-installed/configured CLI. This screen does not install or edit shell commands.
Assistant first	Phone assistant handles configured incoming calls and transfer behavior.
Human forwarding	Uses the configured human forwarding number. Provider routing and forwarding still require setup.

HOW TO USE THIS SCREEN

1. Choose Chat backend and Phone handling, then select Save assistant modes.
2. Inspect credentials and provider calendar connections below. Saved values are not a live health certificate.
3. Use Assistant settings preview for a deterministic reading of current settings. It does not call a model, send a message or create an appointment.

VERIFY THE RESULT

Refresh this screen and confirm the saved modes. Perform a separately supervised live chat/call test after the provider configuration is ready.

IMPORTANT

Changing a mode does not buy a phone number, forward an existing carrier line, complete carrier registration, connect a PMS or establish insurance eligibility.

Connections: credential field reference

Select Provider, Credential field, paste a new value privately and choose Save credential.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
OpenAI / api_key	Provider-issued API key for this Dental deployment. Never put it in a website page or public embed snippet.
OpenAI / model_primary, model_fast	Model identifiers permitted for your account and compatible with the existing backend; ask the operator when unsure.
Twilio / account_sid, auth_token	Credentials from this app's Twilio account or dedicated subaccount.
Twilio / from_number, forward_to	E.164 numbers, for example +12025550100 in a fictional example. From must be an owned/authorized sender; forward_to is the human route.
SendGrid / api_key, from_email	Provider API key and a verified sender email. The sender must be authorized in SendGrid.
n8n / webhook_url	Full HTTP(S) production webhook URL; treat the complete URL as a secret capability.
Stripe / secret_key, webhook_secret	Private payment credentials for the configured payment integration. Do not paste publishable keys into secret fields.

HOW TO USE THIS SCREEN

1. Choose the correct provider and key name. Paste the value; the input deliberately remains a password-style field.
2. Save one field at a time. Verify the saved/masked indicator below the form. Blank inputs do not erase existing credentials.
3. Use Remove only when deliberately disconnecting a field. Dependent services may stop immediately.

VERIFY THE RESULT

Refresh and confirm the key is listed as saved/readable. Then check real provider delivery or calendar behavior; a masked saved key can still be invalid or expired.

IMPORTANT

Do not rotate Dental's encryption key to fix an unreadable saved credential. Restore the original key or deliberately replace that individual credential. This manual contains no real secrets.

Connections: Google and Microsoft calendars

A provider calendar needs its own OAuth authorization. Server application credentials are separate from the saved messaging keys.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Provider row	The clinician created under Team & availability.
Connect Google / Microsoft	Opens the provider's consent screen when server OAuth client credentials are present.
Disabled connection link	The operator has not configured the corresponding server OAuth application credentials.
Connection status / account	Shows the saved connection state and associated provider account. It is not proof that every sync has succeeded.
Google callback	https://dentaladmin.savija.io/oauth/google/callback
Microsoft callback	https://dentaladmin.savija.io/oauth/outlook/callback

HOW TO USE THIS SCREEN

1. Ask the operator to register the exact callback URL and configure Dental's own OAuth client credentials.
2. While signed in, select the appropriate Connect link for the correct provider. Review the account and permissions on the provider consent page.
3. After authorization, return to AI, voice & connections. Check the account and status, then test a busy period and a new booking in staging.

VERIFY THE RESULT

The consent callback should return to /#connections. A known external busy time must not be offered as a new appointment.

IMPORTANT

OAuth session/state checks prevent another practice or an expired consent flow being accepted. If authorization expires, start Connect again. Direct Open Dental, Dentrix and Eaglesoft access is not implemented by these calendar links.

Front desk: requests and channel history

Front desk / Front desk > Work queue and Channel inbox manage follow-up work.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Work queue	Encrypted requests from public contact forms and /help. A request is not an appointment.
Owner	Assign an existing staff account or leave unassigned.
Priority / due time	Normal, High or Urgent. Due time is based on callback policy; overdue requests are flagged.
Status	Open, in progress, waiting, completed or closed. Save request to persist a change.
Internal note	Visible to authorized staff in the timeline. Adding a note does not send a patient message.
Channel inbox	Indexes preserved calls, chats and callback records. Open a transcript only when needed; access is audited.

HOW TO USE THIS SCREEN

1. Start with overdue and urgent requests. Confirm whether another staff member already owns the work.
2. Assign an owner, update the status and save. If the record changed, reload before making a new update.
3. After a real callback or follow-up is completed, add a concise internal note and mark the work completed.

VERIFY THE RESULT

Refresh the queue to confirm ownership/status and inspect the timeline. Public APIs must never return the request body or transcript.

IMPORTANT

The channel index is not a unified verified patient identity graph. It does not automatically merge callers or expose private records based on a phone-number match.

Front desk: setup, versions and outcomes

Front desk / Front desk > Setup & versions configures the public callback policy.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Business name / assistant name	Names for this callback-policy configuration; do not confuse these with the main website brand and operational practice profile.
Greeting / urgent message	Approved explanatory text. Urgent instructions should come from the practice; do not invent medical advice.
Support email / phone	Contact details for the callback route.
Callback hours	Expected response window, 1 to 168 hours. It is a stated expectation, not proof that someone is on duty.
Languages	Comma-separated language codes, for example en. Availability of live language service requires separate validation.
Retention days	Age threshold for eligible closed front desk requests, 30 to 730 days.

HOW TO USE THIS SCREEN

1. Fill the form and choose Save draft. The public policy does not change yet.
2. Choose Preview & test on that revision. Read the deterministic responses, then choose Publish / restore this version.
3. Use a prior tested revision to restore policy if needed. New callback requests record the active revision ID.

VERIFY THE RESULT

Check /help for the published urgent instruction and response expectation. Outcomes should show actual request statuses and overdue work, excluding marked demo enquiries.

IMPORTANT

This workflow does not silently replace voice prompts, calendar settings or Website content. It is not an LLM quality test or a live phone-call test.

Front desk: delivery, security and retention

Front desk / Front desk contains separate operational tabs for these controls.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Delivery	Existing outbox messages with channel, status, attempts and scheduled/sent timestamps.
Retry failed delivery	Requeues a failed item for the existing worker. It is not immediate proof of delivery.
Integration readiness	Missing/present credential hints. Use native Connections to manage settings.
Security	Enroll an authenticator for the currently signed-in individual staff account.
Retention preview	Counts old completed/closed front desk requests under the current threshold.
Delete eligible closed requests	Explicitly deletes those request details and internal notes after confirmation.

HOW TO USE THIS SCREEN

1. When a message fails, fix the sender/provider problem first, then retry only the intended failed record.
2. Use the Dental Patient Portal delivery view for portal invitations, codes and appointment notices.
3. Review retention counts carefully before deleting. Keep any required practice records under the separately approved retention policy.

VERIFY THE RESULT

A retry should move a failed outbox record to queued. After the worker runs, inspect the new state. Provider acceptance and final delivery are different events.

IMPORTANT

Front desk retention does not delete clinical records, recordings, backups or provider copies. No automatic enterprise-wide retention or compliance guarantee is implied.

Patient care: private portal records

Patients / Patient care is the private portal view, distinct from the generic administrative Patients module.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Search patients	Filter the portal patient list by name.
Open record	View the patient's submitted intake, confirmed insurance details, document links and private conversation.
Intake	Patient-submitted identity, history and acknowledgments. Review clinically using the practice's normal procedures.
Private documents	Authorized links for insurance images or identity documents. Do not copy these into Media or Gallery.
Reply to patient	Stores a private portal message. It does not imply an email/SMS was delivered.
Send portal invitation	Shown for an existing pending patient record. Queues an invitation through the portal worker.

HOW TO USE THIS SCREEN

1. Open the correct patient after following the practice's identity-verification procedure.
2. Review the relevant record and documents without downloading or duplicating unnecessary personal data.
3. Type a concise private reply and select Send private reply. Use the portal conversation for sensitive matters rather than the public contact form.

VERIFY THE RESULT

Sign in as the intended fictional patient in staging and verify only that account can read the reply and its own documents.

IMPORTANT

Patients can self-register and verify on the public portal. A generic CMS Patients record is not a portal account. Verified guardian/dependent sharing is not implemented; do not share one patient login across a family.

Patient Portal: booking, linking and delivery

Patients / Patient Portal controls patient booking permissions and staff-made booking visibility.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Cancellation notice hours	Zero means no advance-notice restriction. A positive value imposes a patient cancellation/rescheduling window.
Services patients can book	Same opt-in flag used by Services & booking. Services must also be active.
Manage links	Review a patient's linked appointments and contact-based suggestions.
Appointment ID to link	Use only after independently confirming the appointment belongs to that patient.
Unlink	Removes portal ownership visibility, leaving the practice appointment intact.
Portal message delivery	Invitation, verification and appointment-message status; retry failed messages after configuration is corrected.

HOW TO USE THIS SCREEN

1. Confirm the practice's real cancellation policy before setting a notice value. Do not invent a minimum notice period.
2. Enable approved services, then verify they appear on the public booking selector.
3. For a staff-made booking, choose the verified patient, inspect suggestions or enter the known booking ID, and link deliberately.

VERIFY THE RESULT

An authenticated patient should see only their linked appointments. A different patient must not see them. A failed sender should show failed/queued status, never a fabricated delivery success.

IMPORTANT

Insurance eligibility requires an enabled real payer provider. Upload/OCR alone does not prove authenticity, membership, coverage or payment. The separate Stedi sandbox uses fixed fictional data and must not be used as a real patient result.

Administrative patient records and rooms

Patients / Patients, Patient notes, Documents, Treatments; Practice setup / Rooms are generic workspace record modules.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Patients	Title plus email, phone and body. Administrative records only; does not enroll or verify a portal login.
Patient notes	Title, patient_id and body. Use an existing administrative patient reference; do not expect automatic linkage to portal intake.
Documents	Title, patient_id and URL. This is a reference record, not the secure insurance-upload pipeline.
Treatments	Title, patient_id and body. Administrative tracking, not a validated clinical chart or scheduling service.
Rooms	Title and body inventory. Does not enforce room/chair booking constraints.
Status / slug	Generic record metadata; publishing these private kinds does not make them part of the public CMS allowlist.

HOW TO USE THIS SCREEN

1. Use New to open the record editor. Enter a descriptive title and only the fields needed for your approved workflow.
2. Save a draft or the appropriate administrative status. Edit existing rows using their current version.
3. Keep private documents in the patient portal. Never use a publicly accessible media URL as a substitute for secure storage.

VERIFY THE RESULT

The record should appear in its administrative list. It should not appear on public pages, even if its generic status is published.

IMPORTANT

These modules retain their earlier data model. They are not a full electronic health record, a source of verified patient identity or an automatic substitute for the operational Services screen.

Pages: page text and search metadata

Website content / Pages. The live website reads published records; draft records stay private.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Title	Public page heading for non-home pages. Example: Our care.
Slug	Lowercase URL segment without a slash: services, doctors, contact, about, insurance or faq. Home uses home.
Status	Choose draft while reviewing; choose published to expose the record to the public website.
Body	Plain-text page introduction. Use reviewed public information, not patient details.
SEO title	Browser/search title. If blank, the page title or brand is used.
SEO description	Short search-description text. It is metadata, not the main visible introduction.

HOW TO USE THIS SCREEN

1. Choose New Pages or edit the existing matching slug. Use existing core slugs rather than creating duplicate versions.
2. Enter title/body and optional SEO fields. Save as draft, review, then edit and publish.
3. Open the exact public path in a private window and check both heading and browser title.

VERIFY THE RESULT

For slug services, inspect /services. For contact, inspect /contact. The home hero is controlled by brand Settings, not the home page body.

IMPORTANT

Core Dental routes have built-in fallback pages. Unpublishing a CMS override restores the fallback; it does not necessarily remove the URL. Deleting a core page record is not a method for disabling a route.

Sections: add content to a page

Website content / Sections adds a plain-text content block and optional image to the selected page.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Title	Public section heading.
Page slug	Exact target without slash: home, services, about, contact or another existing page slug.
Body	Plain text for the section. HTML is escaped; do not enter scripts or expect a visual page builder.
URL	Optional HTTP(S) image URL or local media URL. Upload an image under Media first when needed.
Alt	Describe the image for accessibility; do not repeat a filename.
Status	Only published sections render publicly.

HOW TO USE THIS SCREEN

1. Create a section, set Page slug to the exact target and enter the title/body.
2. For an image, paste the saved media URL and enter useful alt text.
3. Save as draft while reviewing, then publish and refresh the target page.

VERIFY THE RESULT

A section with Page slug home should appear on the homepage. A section with Page slug about should appear on /about.

IMPORTANT

No drag-to-order field is included. The interface does not promise a custom section order. A new page record is needed if the target route does not otherwise exist.

FAQs and testimonials

Website content / FAQs and Testimonials provide public answers and approved patient feedback.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
FAQ title	The question, for example How do I book my first visit?
FAQ body	A short, approved answer. Avoid personalized clinical advice or an insurance guarantee.
FAQ status	Publish after review. Custom FAQ entries appear alongside the built-in Dental answers.
Testimonial title	Approved public attribution, subject to the practice's consent process.
Testimonial body	The exact approved public quote; do not invent reviews or patient outcomes.
Testimonial status	Published quotes appear in the homepage patient-voices section.

HOW TO USE THIS SCREEN

1. Create an FAQ, enter a question in Title and its answer in Body, and publish after approval.
2. Open /faq and use the search box to find the new question. Expand it with keyboard or mouse.
3. For testimonials, obtain permission through the practice's process before publishing any attribution or quote.

VERIFY THE RESULT

The new FAQ should be searchable on /faq and visible in the homepage FAQ list. Approved testimonials should appear only when published.

IMPORTANT

The built-in FAQ set remains as fallback guidance. This screen does not remove a built-in answer. Review fallback language alongside practice-specific policies before launch.

Blog: publish a practice article

Website content / Blog creates public article cards and their readable article routes.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Title	Public article heading.
Slug	Unique lowercase URL segment, for example preparing-for-your-first-visit.
Body	Plain-text article content. HTML and scripts are escaped, not executed.
SEO description	Summary used for the article card and search metadata where applicable.
Status	Draft for review; published for the live website.
Public route	A published article uses /<slug> and is listed on /blog.

HOW TO USE THIS SCREEN

1. Choose New Blog, enter a unique slug, title, reviewed body and short SEO description.
2. Save as draft for review, then change status to published.
3. Open /blog, follow Read more and verify the article title/body.

VERIFY THE RESULT

The published card should link to a working article route. A private draft must not be exposed through the public content API.

IMPORTANT

Avoid using reserved core slugs such as services, book, portal or faq for articles. This release does not include a rich-text layout editor or article scheduling.

Media and gallery: publish safe images

Website content / Media stores reusable image references; Gallery displays selected public images.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Media title / alt	Give the asset a useful description and accessibility text.
Upload image	PNG, JPEG or WebP, up to 5 MB in the workspace uploader. Follow the on-screen validation.
Saved URL	The public asset reference. Save the Media record after upload; then reuse its URL.
Gallery title / URL / alt	Create a separate Gallery record pointing to the intended public image.
Gallery status	Publish to display on /gallery. A Media record alone does not automatically populate Gallery.
Section image	Paste the Media URL into a Section's URL field to show it on a chosen page.

HOW TO USE THIS SCREEN

1. Upload an approved public office or team image through Media. Enter alt text and save the record.
2. Copy its URL into a Gallery record or the target Section. Publish that display record.
3. Open /gallery or the target page and check both the image and alt text.

VERIFY THE RESULT

The image should load without a broken icon. Private patient documents must not appear in the public media library or HTML.

IMPORTANT

Insurance cards, IDs and patient photos belong in private patient workflows, never public Gallery/Media. Existing image type/size checks are not a claim that a full malware-scanning service has been deployed.

Navigation: edit the public header menu

Website content / Navigation controls the configurable public links, not the grouped admin sidebar.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Title	Public link label, for example Our care or Meet the team.
URL	Use a valid local path such as /services or a deliberate approved HTTP(S) destination.
Status	Published navigation records replace the default four configurable Dental header links.
Patient login / Book a visit	Fixed action links remain available separately.
No published entries	The default Our care, Your team, Insurance and FAQs links are used.
Ordering	There is no explicit drag-sort field. Do not depend on arbitrary list order.

HOW TO USE THIS SCREEN

1. Plan the entire desired configurable menu before publishing the first navigation record.
2. Create one record per link, check the target URL, then publish the approved set.
3. Test every header link on desktop and in the mobile menu.

VERIFY THE RESULT

The public header should display the published link labels and route to the expected pages. Its Book a visit action should use /book.

IMPORTANT

One published navigation entry means the configurable menu can contain only that entry. Add the complete intended menu, or leave all entries draft to use defaults.

Brand settings and public insurance information

Website content / Settings updates the homepage brand; Insurance holds public plan-related copy.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Setting Title = name	Website header, footer and default brand name. Also updated when Practice settings syncs its name.
Title = eyebrow	Homepage introductory label.
Title = headline	Homepage main heading.
Title = description	Homepage lead copy and default description.
Title = cta	Homepage primary button label. Its destination remains /book.
Setting body / status	Put the value in Body and publish. Use exact lowercase setting names.
Insurance title / body	Approved accepted-plan or process information displayed on /insurance when published.

HOW TO USE THIS SCREEN

1. For a brand value, create or edit a Settings record with the exact title, enter its Body and publish it.
2. Use Practice settings for office contact/hours and Settings for marketing headline/lead copy.
3. Publish insurance information only after the practice confirms its accuracy; direct patients to the secure portal for individual details.

VERIFY THE RESULT

Refresh the homepage and check the changed label or headline. Check /insurance for public copy without any member identifiers or eligibility results.

IMPORTANT

Custom settings other than name, eyebrow, headline, description and cta are not consumed as brand overrides. Insurance copy does not configure payer credentials or prove individual coverage.

Users, audit and daily handover

Access & history / Users and Audit. Keep administration tied to individual people.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
User email	Unique staff login email. Updating it can revoke existing sessions.
Password	Use a strong unique password. Existing user edits can leave it blank to retain the password.
Role	Staff, admin or super_admin, subject to the signed-in user's permissions.
Delete user	Revokes access. The interface prevents deleting your own current account.
Audit	Actor, action, reference and time. Use references to investigate changes without placing clinical content in audit descriptions.
Internal handover	Record completed callbacks and unresolved requests with clear ownership in Front desk.

HOW TO USE THIS SCREEN

1. Create an individual account for each authorized staff member. Give administrator access only where needed.
2. Review users when staff join, change responsibilities or leave. Enroll authenticators per person.
3. At handover, review urgent/overdue requests, unsent notices, the next day's schedule and any changed public content.

VERIFY THE RESULT

A staff login should not be able to change practice/provider credentials or publish configuration. Audit entries should identify who made native practice changes.

IMPORTANT

Location-specific clinician/receptionist roles and a complete automated offboarding/export workflow are not implemented. Do not describe the existing roles as that more granular system.

Verify the admin-to-public connection

Use this checklist after changing configuration. Save and publish are different operations.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Practice name + sync	Public header/footer name; inspect the homepage and /contact.
Profile contact/hours	Public /contact and scheduling rules; a Twilio number can override the displayed phone.
Active service	Public /services. Patient-bookable flag additionally controls /book service choices.
Provider profile	Public /doctors and the booking provider selector.
Location	Active locations on /contact; assignment affects explicit staff booking location validation.
Published FAQ / Blog / Gallery	/faq, /blog and /gallery, with appropriate target article or image links.
Published page / section / setting	Exact page route, Page slug target, or homepage brand field.
Patient care / staff notes	Private portal/staff views only. Must not appear on public pages.

HOW TO USE THIS SCREEN

1. Open the public site in a private window so an old staff session or browser cache does not confuse verification.
2. Check the exact page, value and link you changed. Test the mobile menu and keyboard focus for navigation changes.
3. For booking, choose a real offered service/provider/date and complete a fictional staging patient flow through successful saving.

VERIFY THE RESULT

A confirmation is trustworthy only after a persisted appointment is returned. A successful content save does not prove calendar, email, SMS or payer connectivity.

IMPORTANT

The PDF describes this bundled release. If your deployed screens differ, first verify Git commit, built image and proxy routing rather than altering patient data or passwords.

Troubleshooting and safe deployment

Fix the failing layer while keeping existing database volumes and encryption keys.

FIELD / CONTROL	WHAT TO ENTER OR EXPECT
Old admin appears	Use the admin root, not /admin. Port 8211 should serve frontdesk.js, navigation.js and workspace.js; HTTPS must proxy to that port.
Practice not configured	The scheduling adapter expects the configured Dental practice row. Inspect tenants before seeding or creating a duplicate.
Online appointments unavailable	Confirm active services, patient booking opt-in and at least one provider.
No offered slots	Check the practice time zone, opening/lunch hours, service duration, existing bookings and external calendar health.
Save changed-record warning	Another save changed the record. Reload, review and reapply deliberately.
Sender failed / unreadable key	Review delivery and provider permissions. Preserve the original encryption key; do not regenerate .env as a repair.

HOW TO USE THIS SCREEN

1. Commit the updated Dental folder to your GitHub repository and pull the intended branch on the VPS. Downloading a ZIP does not push GitHub changes.
2. From /opt/swag/ai-frontdesk/Dental, preserve .env and run: sh infrastructure/scripts/deploy-app.sh. This rebuilds Dental's own services.
3. Validate the public site, admin root, patient access, saved appointments and delivery after deployment. Keep a tested rollback/backup process.

VERIFY THE RESULT

The new sidebar should show functional groups and native Calendar, Team, Practice and Connections screens. OAuth consent may leave the site temporarily; old console pages should not open from these menu items.

IMPORTANT

No live VPS changes, provider credentials, real patient records or compliance certification are included in this release. Docker builds, PostgreSQL concurrency and real provider delivery still need staging/VPS verification.