One Big Media Company

GOHIGHLEVEL SNAPSHOT · DENTAL PRACTICES

# Dental Snapshot: Setup & Walkthrough Guide

Install, configure and launch every workflow, pipeline and form.

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OVERVIEW

# What's inside

A HIPAA-aware GoHighLevel system for dental practices that answers new-patient calls, works the recall list, follows up on unscheduled treatment and runs year-end benefits campaigns.

- 21 pre-built workflows written for general and family dental practices
- Year-end insurance benefits campaign for October through December
- Hygiene recall reminders by interval (3, 4, 6 or 12 months)
- Unscheduled treatment follow-up sequence covering insurance, phasing and payment options
- Missed-call text-back with an emergency prompt
- Sales pipeline with New Patient Visit Booked, Exam Completed and Treatment Plan Presented stages
- Patient Journey from Treatment Scheduled to Treatment Completed and Referral Partner
- Back-to-school family checkup campaign
- "New Patient Visit" calendar with insurance and paperwork reminders
- 7 dental custom fields including insurance, recall interval and unscheduled treatment value
- Appointment request form that collects scheduling and insurance basics only
- Review request with private service recovery for unhappy patients
- Lapsed-patient reactivation campaign
- Setup guide with HIPAA-aware notes, 6-lesson course outline and agency sales kit

## Pipelines

**Sales Pipeline**

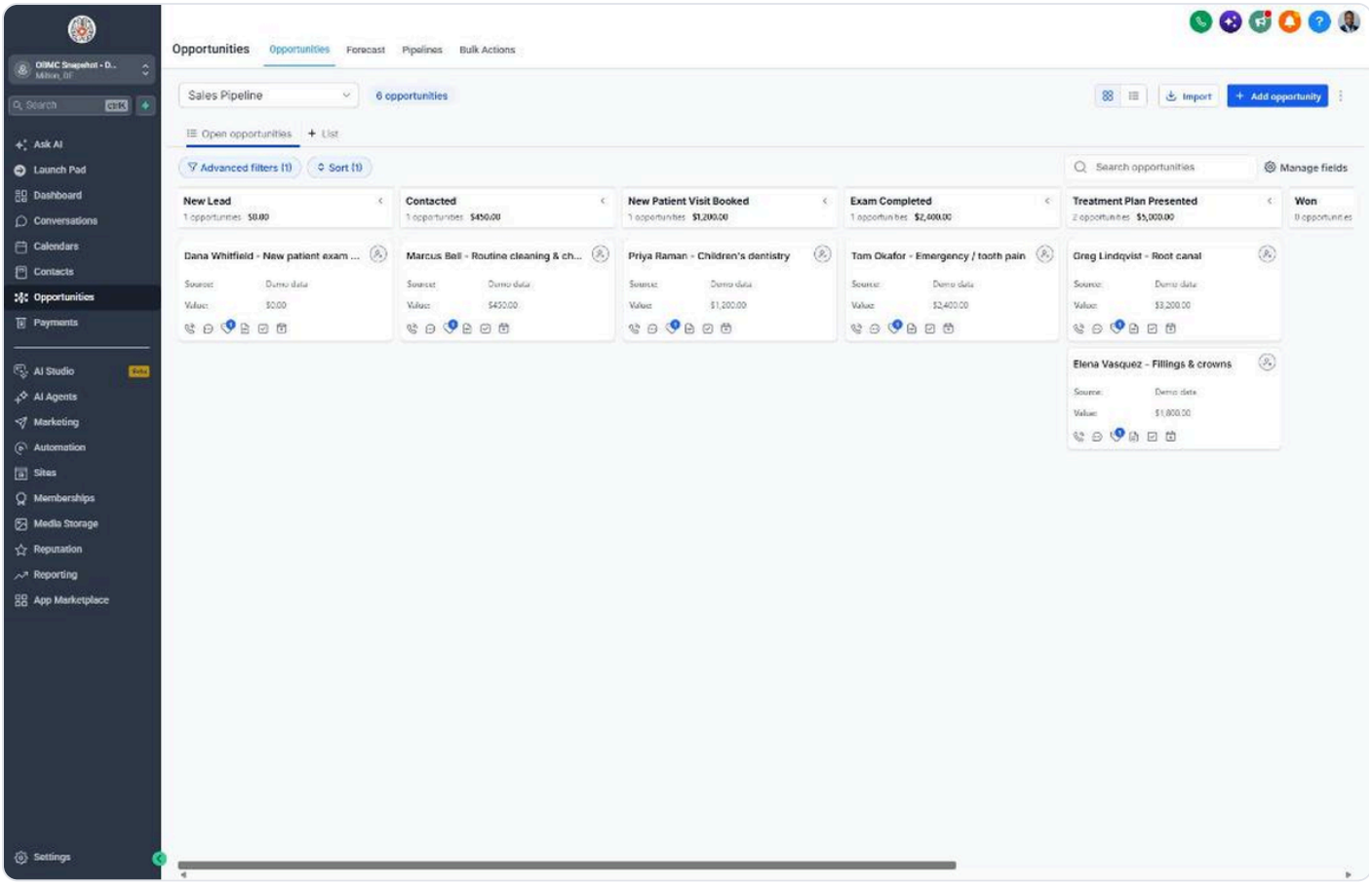
New Lead | Contacted | New Patient Visit Booked | Exam Completed | Treatment Plan Presented | Won | Lost | Long-Term Nurture

**Customer Journey**

Treatment Scheduled | Treatment In Progress | Treatment Completed | Feedback Requested | 5-Star Reviewed | Referral Partner

**Reactivation**

Campaign Sent | Replied - Interested | Booked | Not Interested


Opportunities
Opportunities
Forecast
Pipelines
Bulk Actions
Sales Pipeline
6 opportunities
Import
Add opportunity
Open opportunities
List
Advanced filters (1)
Sort (1)
Search opportunities
Manage fields
New Lead
1 opportunities $0.00
Contacted
1 opportunities $450.00
New Patient Visit Booked
1 opportunities $1,200.00
Exam Completed
1 opportunities $2,400.00
Treatment Plan Presented
2 opportunities $5,000.00
Won
0 opportunities
Dana Whitfield - New patient exam ...
Marcus Bell - Routine cleaning & ch...
Priya Raman - Children's dentistry
Tom Okafor - Emergency / tooth pain
Greg Lindqvist - Root canal
Elena Vasquez - Fillings & crowns
Ask AI
Launch Pad
Dashboard
Conversations
Calendars
Contacts
Opportunities
Payments
AI Studio
AI Agents
Marketing
Automation
Sites
Memberships
Media Storage
Reputation
Reporting
App Marketplace
Settings

INSTALL

# 12-step setup checklist

1. **Load the snapshot**
   In Agency view, go to Account Snapshots > Imported Snapshots and load the Dental snapshot into a new or existing sub-account. If your plan offers HIPAA features, enable them on the sub-account before importing any patients.

2. **Fill in the business profile**
   Go to Settings > Business Profile and enter the practice name, address, phone, website and time zone. Reminders and campaigns send based on this time zone.

3. **Set your custom values**
   Go to Settings > Custom Values and fill in Business Name, Owner Name, Business Phone, Service Area and the four links. Adjust the Lead Offer to your actual new patient special and confirm it meets your state board's advertising rules.

4. **Connect a phone number and register A2P**
   Go to Settings > Phone Numbers, buy or port the office number, and complete A2P 10DLC registration in the Trust Center tab with the practice's legal name and EIN. Wait for approval before sending recall or campaign texts.

5. **Connect email sending**
   Go to Settings > Email Services and add a dedicated sending domain, then add and verify the DNS records. This keeps recall and benefits emails out of spam.

6. **Configure the new patient calendar**
   Go to Calendars > Calendar Settings and open "New Patient Visit." Set the appointment length and the times the practice reserves for new patients, add your cancellation policy and copy the booking link into the Booking Link custom value.

7. **Review the pipelines**
   Go to Opportunities > Pipelines and confirm the New Patient Visit Booked, Exam Completed and Treatment Plan Presented stages. Use the estimated patient portion as the opportunity value and never put procedure names in deal titles.

8. **Connect Google reviews**
   Go to Settings > Integrations and connect Google Business Profile, then copy the review link from Reputation > Settings into the Review Link custom value. When replying to reviews, never confirm someone is a patient.

9. **Customize and embed the appointment form**
   Go to Sites > Forms > Builder and open "01 · Request a Quote / Booking Request." Keep the questions to contact, insurance basics and preferred time, add a consent-to-text checkbox and embed it on the website.

10 **Import recall and unscheduled treatment lists**
Export recall-due, unscheduled treatment and lapsed-patient reports from your practice management system. Import them in Contacts > Import, mapping Recall Interval, Next Service Due, Unscheduled Treatment Value and Insurance Carrier. Only import patients who agreed to receive texts.

11 **Publish the workflows**
Go to Automation > Workflows, review the copy with the office manager and publish. Start with 01, 02, 04, 05, 07 and 19. Schedule Workflow 21 for early October by tagging insured patients 'niche campaign'.

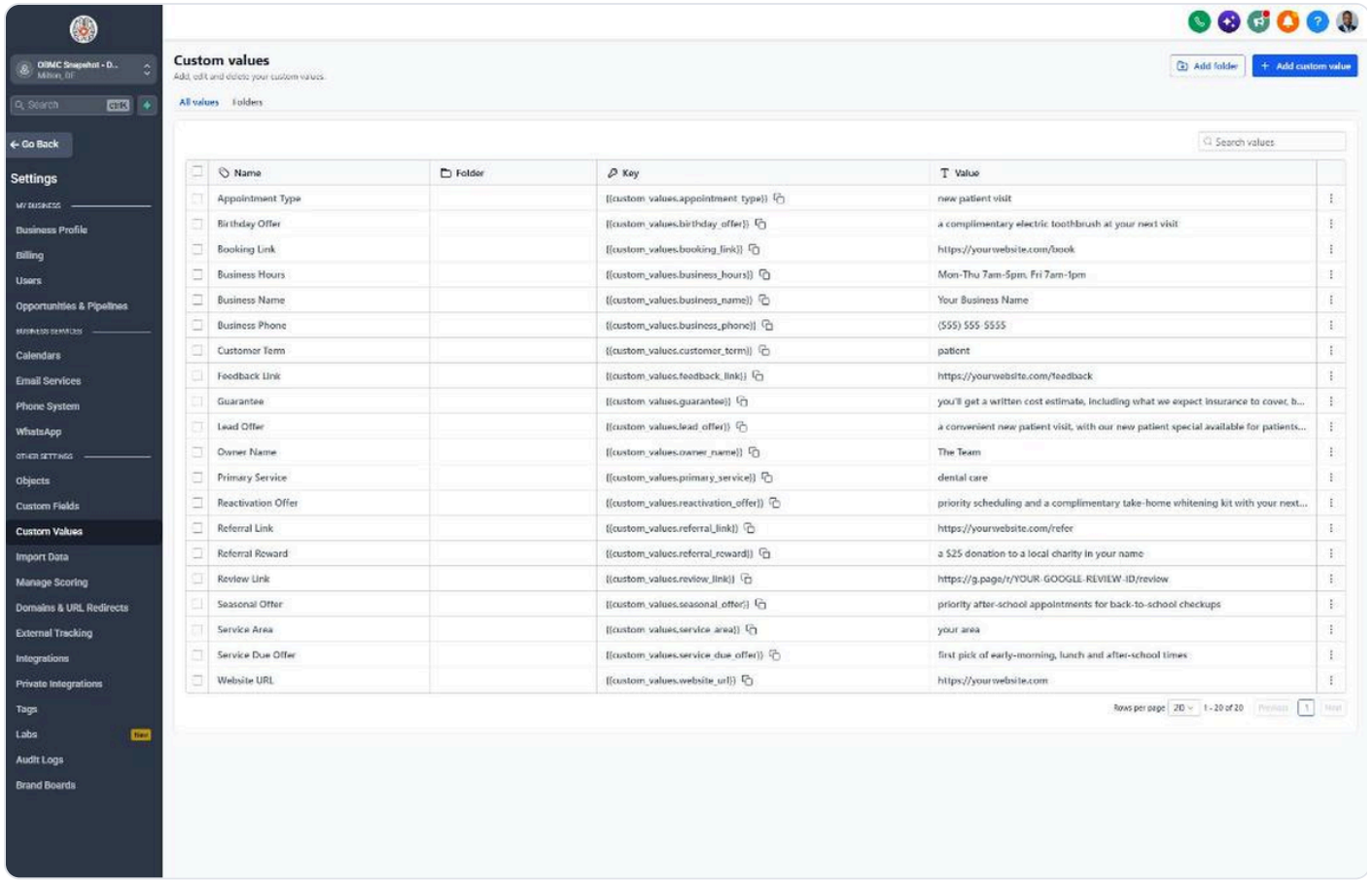
12 **Go live test**
Submit the appointment form with your own details, call the office line and let it ring out, and book a test new patient visit. Confirm the texts, emails and team alerts arrive and contain no health details, then delete the test contact.

CONFIGURE

# Custom values

Settings → Custom Values. Every workflow reads from these.

| Custom value | Dental default / what to enter |
|---|---|
| **Business Name** | Your business name |
| **Business Phone** | Your business phone |
| **Owner Name** | Your owner name |
| **Website URL** | Your website url |
| **Booking Link** | Your booking link |
| **Review Link** | Your review link |
| **Feedback Link** | Your feedback link |
| **Referral Link** | Your referral link |
| **Service Area** | Your service area |
| **Customer Term** | patient |
| **Appointment Type** | new patient visit |
| **Primary Service** | dental care |
| **Lead Offer** | a convenient new patient visit, with our new patient special available for patients without insurance |
| **Guarantee** | you'll get a written cost estimate, including what we expect insurance to cover, before any treatment begins |
| **Referral Reward** | a $25 donation to a local charity in your name |
| **Reactivation Offer** | priority scheduling and a complimentary take-home whitening kit with your next cleaning |
| **Seasonal Offer** | priority after-school appointments for back-to-school checkups |
| **Service Due Offer** | first pick of early-morning, lunch and after-school times |
| **Birthday Offer** | a complimentary electric toothbrush at your next visit |
| **Business Hours** | Mon-Thu 7am-5pm, Fri 7am-1pm |


Custom values
Add, edit and delete your custom values.
Add folder
Add custom value
All values
Folders
Search values
Name
Folder
Key
Value
Appointment Type
{{custom_values.appointment_type}}
new patient visit
Birthday Offer
{{custom_values.birthday_offer}}
a complimentary electric toothbrush at your next visit
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Mon-Thu 7am-5pm, Fri 7am-1pm
Business Name
{{custom_values.business_name}}
Your Business Name
Business Phone
{{custom_values.business_phone}}
(555) 555-5555
Customer Term
{{custom_values.customer_term}}
patient
Feedback Link
{{custom_values.feedback_link}}
https://yourwebsite.com/feedback
Guarantee
{{custom_values.guarantee}}
you'll get a written cost estimate, including what we expect insurance to cover, b...
Lead Offer
{{custom_values.lead_offer}}
a convenient new patient visit, with our new patient special available for patients...
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
dental care
Reactivation Offer
{{custom_values.reactivation_offer}}
priority scheduling and a complimentary take-home whitening kit with your next...
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
a $25 donation to a local charity in your name
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
priority after-school appointments for back-to-school checkups
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
first pick of early-morning, lunch and after-school times
Website URL
{{custom_values.website_url}}
https://yourwebsite.com
Rows per page
20
1 - 20 of 20
Previous
1
Next
Go Back
Settings
MY BUSINESS
Business Profile
Billing
Users
Opportunities & Pipelines
BUSINESS SERVICES
Calendars
Email Services
Phone System
WhatsApp
OTHER SETTINGS
Objects
Custom Fields
Custom Values
Import Data
Manage Scoring
Domains & URL Redirects
External Tracking
Integrations
Private Integrations
Tags
Labs
New
Audit Logs
Brand Boards

WALKTHROUGH

# All 21 workflows

**01 · New Lead → Speed-to-Lead + 7-Day Follow-Up**

**TRIGGER** Form 01 submitted, or tag 'start lead nurture' added

**STEPS** Tag new lead → Create opportunity in Sales Pipeline → New Lead → Instant SMS reply with booking link → Instant email: what happens next → Text + email alert to the team → Day 1 SMS follow-up → Day 2 email: why customers choose you → Day 4 SMS: quick question → Day 7 email: close the loop → Move to Long-Term Nurture

*Stops when the lead replies*

> Hi **first name**, it's **business name**. Thanks for reaching out! We'd love to schedule **lead offer**. Book here: **booking link** or reply with a good time to call. Reply STOP to opt out.

**02 · Missed Call → Instant Text-Back**

**TRIGGER** Inbound call is busy, no-answer or voicemail

**STEPS** Text-back within seconds → Create opportunity → New Lead (source: missed call) → Text alert to the team

*Runs every time*

> Hi, this is **business name**. Sorry we missed your call, we're with a patient. How can we help? Reply here or book online: **booking link** In pain? Call us back and say so. Reply STOP to opt out.

**03 · Customer Replied → Hot Lead Alert**

**TRIGGER** Customer replies (SMS, email, chat)

**STEPS** Tag hot lead → Text the team the reply so nobody waits

*Runs every time*

**04 · Appointment Booked → Confirm + Reminders**

**TRIGGER** Customer books on the calendar

**STEPS** Tag appointment booked → Move deal → Appointment Booked → Confirmation SMS + email with reschedule link → Team alert → 24-hour reminder SMS → 2-hour reminder SMS

*Runs for every booking*

> You're confirmed, **first name**! Your appointment at **business name** is **start time**. Need to change it? **reschedule link**

**05 · No-Show → Reschedule Recovery**

**TRIGGER** Appointment status changes to No-show

**STEPS** Tag no-show → Sorry-we-missed-you SMS + email with booking link → Team alert → Day 1 rebook SMS → Day 3 final SMS

*Stops when they reply*

> Hi **first name**, we missed you today at **business name**. We hope everything's okay! Would you like to pick a new time? **booking link**

**06 · Appointment Completed → Proposal Prep**

**TRIGGER** Appointment status changes to Showed

**STEPS** Move deal → Appointment Completed → Thank-you SMS → Team alert: send the proposal within 24 hours

*Runs every time*

**07 · Proposal Sent → Follow-Up Sequence**

**TRIGGER** Deal moves to Proposal Sent

**STEPS** Day 1 SMS check-in → Day 3 email: questions? → Day 6 SMS: hold your spot → Day 13 final email → Team alert if still no answer

*Stops when they reply*

> Hi **first name**, it's **business name**. Do you have any questions about the treatment plan we reviewed at your visit? We're happy to help you find a time. Just reply or call us.

**08 · Deal Won → Welcome + Customer Journey**

**TRIGGER** Deal moves to Won

**STEPS** Tag customer, remove lead tags → Create Customer Journey deal → Scheduled → Welcome SMS → Welcome email: what happens next → Team alert

*Runs every time*

> Welcome to **business name**, **first name**! We're glad to have you as a patient. Save this number for scheduling questions. For emergencies, call **business phone**.

**09 · Deal Lost → 30/60/90-Day Nurture**

**TRIGGER** Deal moves to Lost

**STEPS** Tag lost → Day 30 check-in email → Day 60 SMS → Day 90 email with comeback offer → Move to Long-Term Nurture

*Stops when they reply*

**10 · Job Completed → Feedback Request**

**TRIGGER** Customer Journey deal moves to Completed

**STEPS** Move → Feedback Requested → Tag review requested → SMS + email asking for a private rating → Day 2 reminder SMS

*Runs every time*

> Hi **first name**, thank you for visiting **business name**! How was your experience with our team? It takes 20 seconds: **feedback link** Reply STOP to opt out.

**11 · Feedback Submitted → Review Ask or Service Recovery**

**TRIGGER** Form 02 submitted

**STEPS** If rating is 4-5: tag promoter, send Google review link, move → 5-Star Reviewed → If rating is 1-3: tag detractor, apology message, urgent team alert to fix it privately

*Runs every time*

**12 · Happy Customer → Referral Request**

**TRIGGER** Tag promoter added

**STEPS** Wait 3 days → Referral SMS with reward → Referral email with reward

*Once per contact*

> Hi **first name**, thank you for the kind words! If a friend or family member is looking for a dentist, we'd love to meet them. As thanks, we'll make **referral reward**: **referral link** Reply STOP to opt out.

**13 · Referral Received → Thank You + Team Alert**

**TRIGGER** Form 03 submitted

**STEPS** Move referrer → Referral Partner → Tag referral partner → Thank-you SMS → Team alert with the friend's name and phone

*Runs every time*

**14 · Database Reactivation Campaign**

**TRIGGER** Tag 'start reactivation' added (bulk-tag an imported list)

**STEPS** Create Reactivation deal → Campaign Sent → SMS 1: still looking for help? → Day 2 SMS: past-customer offer → Day 5 email offer → Day 10 last-call SMS → Remove the campaign tag

*Stops when they reply*

> Hi **first name**, it's **business name**. It's been a while since your last visit and we'd love to see you. Would you like a few open times for a cleaning and checkup? Reply STOP to opt out.

**15 · Invoice Sent → Payment Reminders**
**TRIGGER** Invoice sent
**STEPS** Wait 3 days → Friendly SMS reminder → Day 6 email reminder → Day 10 team alert for a personal call
*Payments workflow (16) stops it when the invoice is paid*

**16 · Payment Received → Thank You**
**TRIGGER** Payment received
**STEPS** Tag customer, remove past-due tag → Thank-you SMS → Team alert
*Runs every time*

**17 · Birthday → Gift Offer**
**TRIGGER** Contact's birthday (date of birth on file)
**STEPS** Birthday SMS with gift offer → Birthday email
*Yearly*

**18 · Stale Deal Alert (7 Days No Movement)**
**TRIGGER** Sales Pipeline deal idle 7+ days
**STEPS** Text + email alert to the team
*Runs every time*

**19 · Service Due → Rebook Reminder**
**TRIGGER** Tag 'service due' added
**STEPS** Service-due SMS with offer → Day 3 email → Day 7 final SMS → Remove the tag
*Stops when they reply*

Hi **first name**, it's **business name**. You're due for your next cleaning and checkup. Book now for **service due offer**: **booking link** Reply STOP to opt out.

**20 · Seasonal Promo Campaign**
**TRIGGER** Tag 'seasonal promo' added
**STEPS** Offer SMS → Day 2 email → Day 5 last-call SMS → Remove the tag
*Stops when they reply*

Hi **first name**, **business name** here. School's almost back! We're offering **seasonal offer**. Want a time? Reply YES or book: **booking link** Reply STOP to opt out.

**21 · Use-It-or-Lose-It: Year-End Insurance Benefits**

**TRIGGER** Tag 'niche campaign' added

**STEPS** Niche SMS → Day 2 email → Day 5 follow-up SMS → Remove the tag

*Stops when they reply*

Hi **first name**, it's **business name**. Many dental plans reset on January 1, and unused benefits often don't roll over. Want us to check your remaining benefits and find a time before year-end? Reply YES. Reply STOP to opt out.

MEASURE

# Weekly KPIs

| Metric | Goal | Where |
|---|---|---|
| Speed to lead | Aim to respond to every new patient inquiry within 5 minutes during office hours | Conversations and contact activity |
| New patients booked | Grow new patient visits booked each month | Opportunities > Sales Pipeline, New Patient Visit Booked stage |
| Recall reappointment | Aim to reappoint most patients reminded by Workflow 19 within 30 days | Automation > Workflows > 19 stats and Calendars appointment list |
| Unscheduled treatment scheduled | Track the dollar value of treatment scheduled after Workflow 07 and grow it monthly | Opportunities > Sales Pipeline, Treatment Plan Presented to Won |
| Year-end benefits bookings | Fill the November and December schedule with hygiene and treatment from the Workflow 21 list | Automation > Workflows > 21 stats and Opportunities Won deals |
| Google reviews | Aim for steady new reviews each week | Reputation > Overview |

## Compliance notes

- HIPAA: ask whether your GHL plan offers HIPAA features and a Business Associate Agreement, and enable them before importing patient data. Import only contact, scheduling and insurance-carrier data, never clinical notes, diagnoses or procedure codes.
- Never ask for or discuss health details by text. Keep reminders generic ('your cleaning and checkup', 'your treatment plan') and move clinical questions to a phone call or secure portal.
- Follow your state dental board's advertising rules for new patient specials, and check whether your insurance contracts limit discounts for insured patients. Avoid outcome claims and superlatives like 'painless' or 'best dentist'.
- Many state dental boards and anti-kickback rules restrict cash or gift rewards for patient referrals. The default referral reward is a charitable donation, so confirm it's allowed in your state before using Workflow 12.
- Register A2P 10DLC and get prior express written consent before sending marketing texts such as Workflows 20 and 21 under the TCPA. Appointment reminders should still honor STOP replies.

## Mini-course outline

1. **Install the Snapshot and Brand It for Your Practice**: Load the snapshot, enable privacy settings and make every message sound like the practice.
2. **Answer Every New Patient Call and Inquiry**: Make sure no new patient inquiry goes unanswered.
3. **Book New Patient Visits and Reduce No-Shows**: Fill new patient slots and protect chair time.

4. **Get Unscheduled Treatment on the Schedule**: Follow up on every presented treatment plan without pressure.
5. **Reviews, Referrals and Reactivating Lapsed Patients**: Grow reviews and referrals and bring lapsed patients back.
6. **Launch Recall and the Year-End Benefits Campaign**: Keep hygiene chairs full and fill the year-end schedule.

General guidance only. This is not legal, tax, medical or financial advice. Results depend on your offer, market and execution.