

SAMPLE

Dental Front Desk Automation Pack

The opening of SETUP.docx, one of 44 files in the kit. <https://solasai.net/products/dental-front-desk-automation/>

Dental Front Desk Automation Pack: Setup Guide

Version 1.0, 19 October 2026. Solas AI, solasai.net. Purchaser use only.

These eight n8n workflows, the Postgres schema they run on, the AI prompts, and the patient email templates are the production exports from two dental practices Solas AI runs them for, with the practice names replaced by variables. They are not a demo. Every path below has sent real texts to real patients. What is not in the pack is the staff dashboard those practices use; the pack works with any Postgres client or admin tool as the "board", and the guide says where a dashboard would plug in.

1. What the pack does

Workflow	Trigger	What happens
lead_capture	Webhook, POST /webhook/lead-capture from your website form	Normalizes and validates the form, verifies the email (optional), inserts the lead, texts the patient within a minute (AI-written, with a plain template as fallback), emails a confirmation, alerts staff by text, logs every step
followup_sequence	Cron, every 2 hours on business days	Leads nobody has contacted get a text at 4 hours, an email at 24 hours, and a final text at 72 hours, then move to "nurture". Stops the moment staff change the stage or the patient replies
followup_reminder	Cron, every 15 minutes	Texts the front desk when a lead's follow-up is due and nobody has acted
review_request_stage	Cron, every 2 minutes	When staff move a patient to the review stage (or press a button that sets it), sends the review-request text once
review_gate	Cron, daily at 10:00 in your time zone	Finds yesterday's completed appointments and sends a short rating request
review_gate_response	Webhook from your survey tool	Rating of 4 or 5 routes the patient to your Google review link; 1 to 3 records private feedback and alerts staff
sms_inbound	Webhook from Twilio	Validates Twilio's signature, matches the sender to a lead (or creates one), handles STOP and START, files the message in the conversation thread

Workflow	Trigger	What happens
sms_outbound	Cron, every 15 seconds	Sends any staff reply queued in the database through Twilio and marks it sent or failed

All of it writes to one Postgres schema: leads, patients, appointments, reviews, conversations, chat_messages, automation_log, and user_profiles.

2. What you need

Component	Required	Notes
n8n, self-hosted (1.60 or later)	Yes	The exports use the Postgres node version 2.4, HTTP Request node 4.x, and Code nodes that need Node's crypto module (set <code>NODE_FUNCTION_ALLOW_BUILTIN=crypto</code>). n8n Cloud works too if you can set environment variables there, which on Cloud means the Variables feature on a paid plan.
Postgres 15 or 16	Yes	Supabase (recommended, its REST layer gives you a board for free), or any Postgres. One database, the schema in sql/.
Twilio account with a 10DLC-registered number	Yes	Patient texting in the US requires A2P 10DLC registration of your brand and campaign. Budget two to three weeks for approval before go-live. Conversational two-way texting is in policy once registered.
Resend account (or any HTTP email API)	Yes for emails	The two email nodes call Resend's REST API. Any provider with a JSON send endpoint can replace it by editing the URL and body in those two nodes.
Anthropic API key (or OpenAI, Gemini)	Optional	lead_capture writes the first text with an AI model when <code>AI_MODE=real</code> . Without a key, set <code>AI_MODE=template</code> and the plain template text is sent instead.
Reacher (email verification)	Optional	One node in lead_capture. Delete the node, or leave <code>REACHER_URL</code> empty, and leads pass through unverified.
Novu (staff notifications)	Optional	Two nodes send staff alerts through Novu. Staff already get a Twilio text in lead_capture, so you can delete the Novu nodes without losing the alert.
A survey tool with a webhook (Formbricks, Typeform, Google Forms via a relay)	Yes for review_gate	review_gate sends the patient a survey link; the survey tool posts the response to review_gate_response. Formbricks is what the practices use. The webhook payload shape is documented in the workflow's notes.
A website form that can POST JSON	Yes	Your contact or referral form posts to the lead_capture webhook. The Normalize node documents the fields it expects.

3. Install, in order

3.1 Database

1. Create the database (a Supabase project or a Postgres database).
2. Run the files in sql/ in numeric order, 0000 through 0014, with psql or the Supabase SQL editor. 0000 is a stub of Supabase's auth schema so the rest applies on plain Postgres; on Supabase it is a no-op.
3. In 0002 and 0013, replace REPLACE_ME_OWNER_EMAIL with the practice owner's sign-in email before running. That address becomes the admin profile.
4. Create a database role for n8n with read and write on the public schema (on Supabase, use the service role connection string, never the anon key).

The sample ends here. The full document runs about 1,764 words; the kit holds 44 files. Version 2.2, 19 October 2026. Buy it at <https://solasai.net/products/dental-front-desk-automation/>, 14-day refund for any reason.