

Setting Up Your WhatsApp AI Assistant

We'll use your answers to build your AI Assistant's knowledge: your hours, prices, booking rules, and safety responses. The AI Assistant never diagnoses anything and never replaces a doctor. A real person at your clinic can jump into the same chat at any time.

How to fill this out: 1. If a document already answers a question, send the document. Do not type that information again. 2. Only write an answer when no document covers that question. 3. If something doesn't apply to you, just write N/A. That's a fine answer. 4. If you leave something blank, we'll reach out and ask you directly rather than guess.

The online form is 5 short pages. Page 1: About You. Page 2: Basic Information (A to E). Page 3: Further Information (F to I). Page 4: Booking and Payment (J to N). Page 5: Specific Information (O to Q).

Nothing goes live on your WhatsApp until you've paid and your Meta account is connected to your own WhatsApp Business number.

A line can stay N/A. Empty means the AI Assistant will hand it to your team. It will not guess.

Clinic name: _____

What type of business are you?: _____

If other, please describe: _____

Your name: _____

Your role: _____

A WhatsApp number where we can reach you about this form: _____

Date: _____

PART 1. What we need to get started

These are the few things we truly can't build without.

A. The Basics

1. What name do your guests know you by (the one they'd see on Google, Instagram, or your front door)?

2. What area and full address are you comfortable sharing with guests?

3. Do you have a Google Maps pin, or directions that would help guests find you (parking, which unit, which floor)?

4. What WhatsApp number are guests messaging you on today? (We won't change or move this number. It stays yours.)

5. What name should show up on your new WhatsApp number? (This should be your clinic's name, not something like "Lana" or "AI.")

6. Should the AI Assistant start with speaking English or Bahasa Indonesia?

B. When you're open

7. What days and hours are you open? Please include any lunch break, and let us know if your website lists different hours than what's actually true. We'll use whichever one you tell us here.

8. Are there any dates in the next 8 weeks when you'll be closed (for example, Nyepi, or a private closure)?

C. Who answers the chat

Every guest stays in one ongoing conversation. Your staff reply to that conversation from a shared screen, not from a personal WhatsApp, so we need to know who's watching it.

9. Who will take over the chat when a guest needs a real person? Please give us their first name and WhatsApp number. If it's a team, that's fine. Just tell us who's first in line.

10. How quickly should a guest's request be confirmed once your team sees it (for example, "within 2 hours")? A request only becomes an actual booking once someone on your team approves it, so guests shouldn't be left waiting too long without knowing.

D. Your services and prices (at least 4, please)

Please use IDR, and give us one line per service. Example: Hangover Reset basic | 45-120 minutes | 1,250,000 | for tourists | not suitable during pregnancy. If you have more services, keep going. There's room for up to 12 in Part 2, Section I.

11. Service 1: name, duration, price, who it's for, and any notes.

12. Service 2: name, duration, price, who it's for, and any notes.

13. Service 3: name, duration, price, who it's for, and any notes.

14. Service 4: name, duration, price, who it's for, and any notes.

E. What to say in an emergency

Your AI Assistant should never diagnose a guest, suggest a medicine, or share lab results. Please read each suggested response and either edit it so it sounds like you, or tell us "this is fine as written."

15. If a guest describes severe trouble breathing or chest pain, what should the AI Assistant say? Suggested: "This sounds urgent. I'm not able to advise on this over chat. Please call [emergency contact] or go to the nearest Emergency Department now. I'm also letting our medical team know right away." Your version, or "this is fine as written":

16. If a guest mentions fainting, heavy bleeding, blood in vomit or stool, a seizure, signs of a stroke, or a severe allergic reaction, what should the AI Assistant say? Suggested: "This needs urgent medical attention that I can't provide over chat. Please go to the nearest Emergency Department or call [emergency contact]. I'm letting our team know right now." Your version, or "this is fine as written":

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17. If a guest asks what antibiotic, cream, or dose they should take, what should the AI Assistant say? Suggested: "I'm not able to recommend medicine or dosages over chat. That has to come from a doctor. Let me connect you with our medical team." Your version, or "this is fine as written":

18. Do you agree that the AI Assistant should never share a diagnosis, a medicine, or lab results over WhatsApp, under any circumstances? (Yes/no)

19. Once a conversation like this is handed to your team, should the AI Assistant stay quiet until a real person replies? (Yes/no)

PART 2. What we need to know

This section adds detail and polish while your AI is being built.

F. More about your clinic

20. Do you have a different legal company name from the one guests see day to day?

21. What's your website address?

22. What's your Instagram handle, and are there any other social media accounts we're allowed to share?

23. What's the link to your Google Business profile?

24. Do you have a public email address for guests?

25. What time zone are you in? WIB / WITA / WIT

G. More about your hours

26. What's the latest time a guest can start a regular appointment, not counting an evening on-call visit? Please let us know if this changes by service type (for example, GP, IV, or blood draws).

27. After you've closed for the day, what should the AI Assistant do? Should it only answer general questions, take a request for your next opening, or mention that on-call visits exist, without promising one is confirmed?

28. Do you offer on-call or evening home visits? If so, until what time and what's the extra cost? This appointment must be confirmed by a real person.

29. On public holidays, are you closed, open for shorter hours, or open as usual?

H. More about your team

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30. Is there a second person who should also have access to the chat (name, plus WhatsApp or email)? Two people is usually enough.

31. On nights and Sundays, who covers the chat: the same person, someone else, or should the AI Assistant just answer general questions until someone's available?

32. Are there any doctors or therapists the AI Assistant is allowed to mention by name to guests? Please give us first names and the days they usually work. One name is fine if that's all you have.

I. The rest of your services and prices

Up to 12 named services in total, including the four from Part 1.

33. Additional service: name, duration, price, who it's for, and any notes.

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36. Additional service: name, duration, price, who it's for, and any notes.

37. Additional service: name, duration, price, who it's for, and any notes.

38. Additional service: name, duration, price, who it's for, and any notes.

39. Additional service: name, duration, price, who it's for, and any notes.

40. Additional service: name, duration, price, who it's for, and any notes.

41. Any further named services not listed above (still counting toward 12 in total).

42. If a guest asks to see your whole menu, we can send them a JPEG of your official price list. Would you be able to provide us with that image? (There's a place to note this at the end, in our documents checklist.)

43. If your prices on Instagram or your website are ever different from what's true on WhatsApp, which one should we trust: are they always the same, or is WhatsApp the one that's current?

44. Are there any services where you don't want to quote a fixed price, and the AI Assistant should instead say "let me check with the team"?

45. When should the AI Assistant offer a package price instead of pricing a single service?

J. How booking works

46. Do you take walk-ins, appointments only, or both?

47. Can guests book for the same day? If so, is there a cutoff time?

48. How long is a typical appointment slot: 15, 20, or 30 minutes, or something else?

49. Before we note down a guest's request, what information do we need from them other than their name, the service, whether it's at your clinic or their home, and the day and time?

50. Do you require a deposit? If so, how much, and when should it be paid?

51. What's your cancellation policy? How much notice do you need, is there a fee, and how strictly is this enforced?

52. Is there anything a guest should bring or prepare before their first visit (a passport or ID photo, previous test results, fasting, or anything else)?

53. Is there a minimum age for any of your services? If a guest is under that age, should we turn them away, book them anyway, or pass it to your staff to decide?

54. Is there anything the AI Assistant should never promise a guest?

K. How guests pay you

This section isn't about how you'll pay us. It's what the AI Assistant should tell a guest who asks how to pay for their visit.

55. How can guests pay: cash, card, QRIS, bank transfer, or paying in advance? Please describe this in your own words.

56. If a guest asks about insurance, should they expect to pay upfront regardless, or do you work with specific insurance providers? If you do, please name them. We'd rather not have the AI Assistant say "we accept insurance" without being able to say which ones.

57. Do guests get a receipt or invoice? If so, is that something the AI Assistant can send, or only your front desk?

L. Home visits, villas, and video calls

Write N/A if you only see guests at your clinic.

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58. Do you offer visits to a guest's home? If so, which areas do you cover?

59. What's the extra cost for a home visit: for one guest, two guests, and each additional guest after that? (This would be on top of the price of the treatment itself.)

60. Is there a typical travel time you'd like us to mention to guests (for example, "around an hour")?

61. Do you offer consultations over video call? If so, what's the price? (Please don't tell us it's free unless you can tell us exactly when that applies.)

PART 3. What would be great to have

These details help once the pilot is already live.

M. After a guest's visit

62. Should lab or medical results ever be sent over WhatsApp, or should the AI Assistant tell guests to come back in person? Can this be handled by AI or only your staff?

63. If a guest needs to fast or prepare beforehand, should the AI Assistant send them your instructions directly, or should this only come from your staff?

64. Would you like the AI Assistant to send a short thank-you message after a visit is confirmed? (This would just be a courtesy message, never a promotion.)

65. If a guest doesn't show up for their appointment, would you like a message sent to them, or should your staff handle that themselves?

N. Appointment reminders

This is only about booking-related messages. Sending promotions or managing a contact list isn't part of this service.

66. Should the AI Assistant send a WhatsApp message to guests when your staff confirm a request? (We'd suggest yes, by default.)

67. Should the AI Assistant send a message when your staff cancel a request?

68. Would you like a reminder sent the day before, or the morning of, an appointment? If so, how would you like it worded?

69. Are there any other automatic messages you'd like sent (like directions, or fasting instructions)?

O. If you're a medical clinic or GP

Please only answer the section that matches your type of business. Skip the others.

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70. Which of these do you actually offer: travel vaccines, diving medical checks, corporate health services, or care for children?

71. For bloodwork, do you have specific packages with set prices, or should a guest see a GP first if they're not sure what they need?

72. For STI or sexual health screening, should the AI Assistant quote a price, or should your team handle that directly?

O. If you're a dental clinic

73. Do you offer cleaning, fillings, whitening, implant consultations, emergency pain relief, or care for children? (Skip anything you've already listed under Section D or I.)

74. Do you need to take an X-ray before giving a guest a price quote?

75. If a guest has a dental emergency the same day, what hours can you see them, and is there an extra fee?

76. If a guest is coming for veneers or implants, how many days should they wait to observe without needing another visit?

O. If you're an IV, wellness, or beauty clinic

77. Could you name your specific drips and facials for us, rather than a general line like "IV, 1.5-2 million"?

78. If a guest is pregnant, has a heart condition, is on antibiotics, or is under 18, should the AI Assistant still book them, turn them away, or pass it to a real person?

79. Is a doctor always on site, only during certain hours, or is it usually just a nurse?

80. Are there any other conditions or situations we should know are unsuitable for your treatments?

P. A few real examples from your guests

81. Could you paste in 3 real WhatsApp messages from guests this week? (Please remove their names first.) This helps us match the tone your guests are used to.

Q. Anything we haven't asked

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Is there anything else we should know: special exceptions, VIP guests, things you'd never want offered, particular phrases you use, supplier names, notes about Nyepi, nicknames your staff go by, a nearby landmark like "next to Kimia Farma," or anything else you'd tell a brand-new receptionist on their first day?

Documents you're able to share

A document that already answers a question is enough. Tick what you will upload, then use Upload. Images, PDF, Word, and any other format are fine. You do not need to send everything on this list. If you have two versions of the same thing, tell us which one is current. Everything stays confidential to your clinic.

Public information and your menu

- ☐ Your website address
- ☐ A link or screenshot of your Google Business profile
- ☐ Instagram highlights or price posts (please let us know if these are out of date)
- ☐ Your current price list (a JPEG works best, but PDF is fine too)
- ☐ Your treatment, IV, or dental menu
- ☐ Bloodwork or lab packages
- ☐ Photos of your storefront, signage, or a map
- ☐ A square version of your logo (for your WhatsApp profile photo)
- ☐ A short, one-line description of your clinic for WhatsApp's About section

Day-to-day operations and safety

- ☐ A printed hours schedule, if it's different from what's on Google
- ☐ Your policy for home or villa visits
- ☐ Any fasting or first-visit instructions you give guests
- ☐ Consent forms you already give to guests
- ☐ Your emergency procedures or red-flag guidance, in your own words
- ☐ A list of the vaccines you offer
- ☐ A staff schedule (first names and the days they work, no ID numbers needed)
- ☐ Any WhatsApp quick replies or FAQ document you already use
- ☐ 3 screenshots of real guest conversations, with names blurred out

Legal and licensing (optional)

- ☐ Your NIB or company registration
- ☐ Your clinic's operating permit, or a doctor's SIP/STR on file
- ☐ Any terms and conditions, cancellation policy, or privacy notice you already give guests

Anything else a brand-new receptionist would need. Just let us know what it is.

How we use this

Facts go into the assistant for this clinic. Empty field: we ask, we do not guess. Live WhatsApp stays off until payment and Meta on your own Business number.