



## AI Receptionist by BookedSolid

The ClinicOffice system allows for integration with BookedSolid, an AI-powered receptionist. This is a nice addition to your existing reception team and can cover you when either your phone lines are all busy or out-of-hours calls.

BookedSolid's AI Receptionist can be configured to not only book appointments for new and existing patients, but also to allow patients to cancel or reschedule existing appointments. They can also answer additional questions such as the treatments you offer or where to park with the use of BookedSolid's knowledge base.

### Setting up BookedSolid

1. The first thing to do is to contact [BookedSolid](#) and get an account.
2. Once you have an account you need to link ClinicOffice to this by logging into your Pioneer Software [Client Portal](#). Go to the **Account Details** section and make sure to enable, "**Enable API**".
3. Copy the **API User** and **API Password** and go back to your [BookedSolid Dashboard](#). From their Portal go to the **Settings** section and expand the **PMS Integration**.
4. Copy the API User number into the "**ClinicOffice Custom Reference**" field and the API Password into the "**ClinicOffice API Key**" field.
5. Click **Save**.

BookedSolid will have a virtual mobile number that you can use to forward your calls. You can also use this number to test the AI Receptionist booking for yourself. You can find the number by going to the [BookedSolid Dashboard](#) and from there, click on the **Channels** tab on the left hand side. At the top of this page will be the virtual phone number.

## Configuring BookedSolid

The first step is to log in to the [BookedSolid Dashboard](#). Below are the main sections, which can be accessed via the dashboard's left-hand side panel, along with our recommendations on how to configure them to work with ClinicOffice.

### Outbound

- Turn OFF the **Appointment Reminders** setting. As ClinicOffice handles this.

### Channels

You will see a mobile number. You will need to forward your clinic calls to this number so that the AI Receptionist can answer on your behalf. Below are a couple of links on how to do this. If you cannot find what you need, please contact your telephone provider.

**Traditional Phones:** [All about Call Diversion | BT Help](#)

**RingCentral:** [Forwarding calls in the RingCentral app and Admin Portal](#)

### Clinic Setup

This will display all clinics, practitioners and appointment types being shared by ClinicOffice with BookedSolid. For more information, please see the next section "[Configuring ClinicOffice for BookedSolid](#)". Whenever you share any new locations, practitioners or appointment types, from ClinicOffice make sure to click the **Refresh** button on the respective pages for those to be pulled through instantly.

### Settings

#### *Account Setup*

- Under '**Patients Fields**', turn OFF **Email** and turn ON **Date of Birth**
- Under '**Payments**', turn OFF **Enable Payments** as BookedSolid currently does not integrate with ClinicOffice for this.
- Under "Office Hours" adjust this to reflect your clinics opening hours. These are used for call-forwarding, auto-replies and other BookedSolid features.

#### *Call Handling*

- If you wish for the AI receptionist to only forward calls to your clinic when it is open then turn ON, "**Only forward when within office hours**"
- Under '**Background Noise**', turn OFF "**Add background noise to calls**"

#### *Message Handling*

- Under '**Set auto-replies**' select OFF
- Under '**Auto Follow-Ups**' turn OFF "**Enable automatic follow ups on unanswered messages**"

## Notifications

- Turn ON, “**I want to receive emails when my customers make or change appointments**” and “**I want to receive new call transcripts over email**”

## Configuring ClinicOffice for BookedSolid

BookedSolid will pick up on similar settings that you have defined within ClinicOffice for the Patient Booking system. For example, whatever clinic, staff member and appointment type are marked as being available for the online booking. Below, we will discuss how to enable each of these for online booking.

### Clinic

These steps explain how to enable a clinic to be bookable online and hence available to BookedSolid.

- Within ClinicOffice, go to the **View** menu and click the **Program Settings** button.
- Click the **Clinic Settings** tab and select the clinic.
- Tick the checkbox “**Allow online booking at this clinic**”.
- Click **OK** to save the changes.

### Staff Member

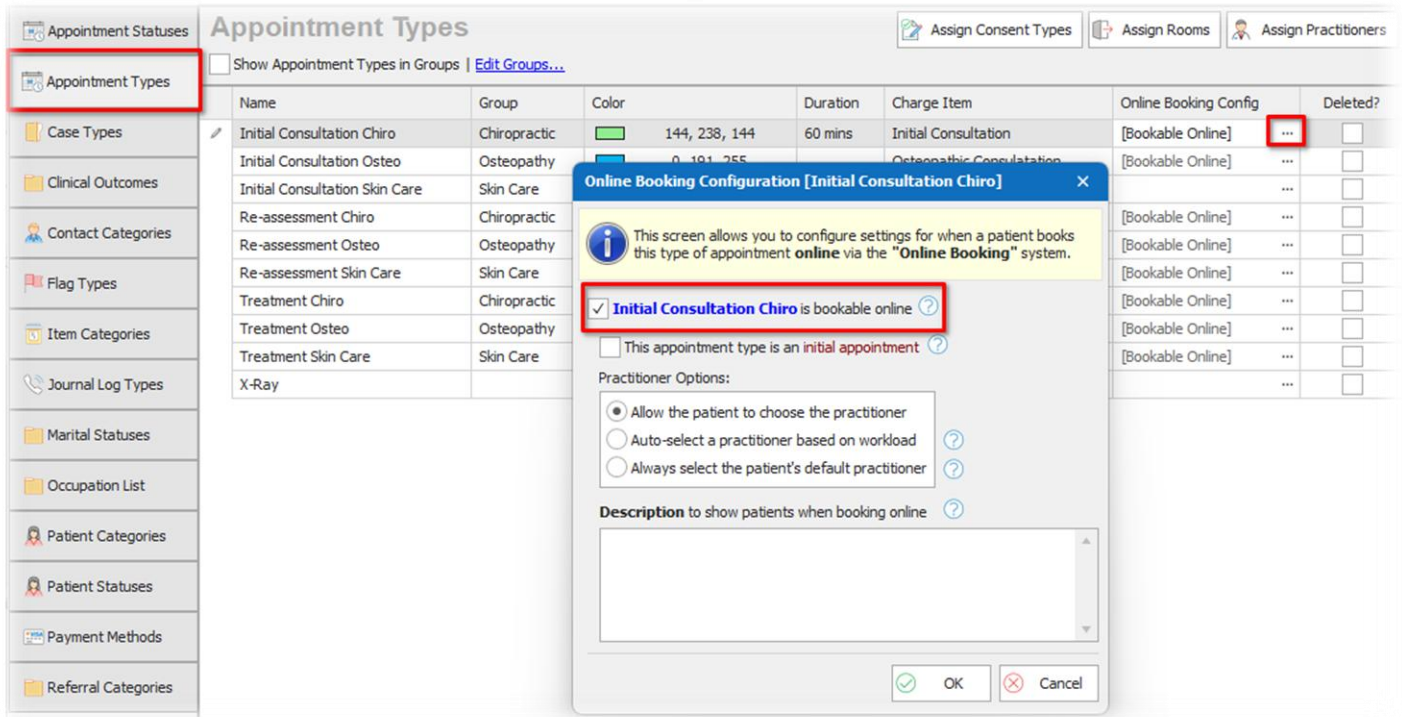
Like the above, these next steps explain how to do the same but for Staff Members.

- Within ClinicOffice, go to the **Staff Members** section of the software.
- Open the staff member’s record, tick the check box “**Accept Online Bookings?**”
- Also make sure that checkbox “**Staff Member is a Practitioner**” is ticked and that this staff member has working hours set.
- Click **Save and Close** to save the changes.

### Appointment Type

These steps explain how to mark an appointment type as being available online booking and for BookedSolid.

- Within ClinicOffice, go to the **View** menu and click the **Types and Categories**.
- Go to the **Appointment Types** tab
- Select an appointment type and click the three dots (...) under the **Online Booking Config** column.
- Tick the checkbox that says that this “**is bookable online**” and click **d** to save



**Q) What if a clinic, staff member or appointment type is marked as being available for online booking, but I do not want this to be an available option for the BookedSolid AI Receptionist?**

A) From within BookedSolid, it is possible to switch off individual locations, practitioners, and appointment types. So, although these will still be visible in your user settings, once switched off, the AI Receptionist will not offer these as an option to the patient.

## More Information on BookedSolid’s Settings

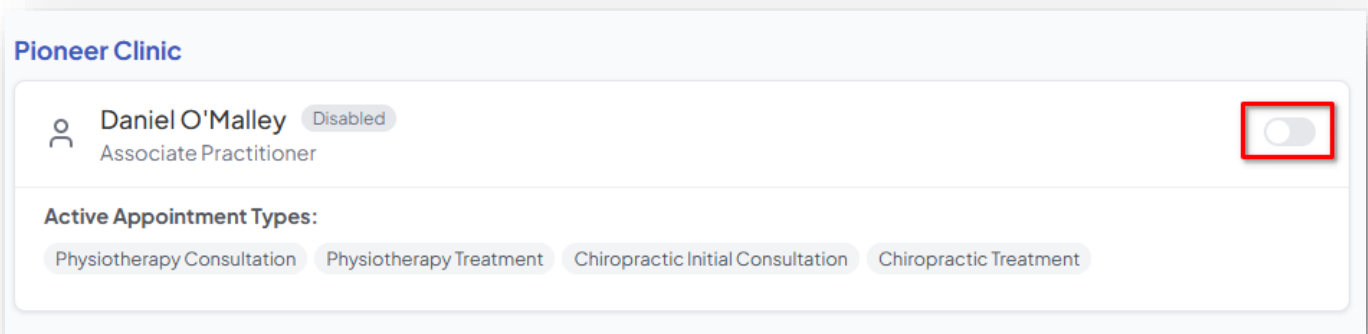
### Clinic Setup

After you have logged into the BookedSolid Dashboard go to the **Clinic Setup**. From here you can select **Locations, Practitioners, Appointment Types** and Knowledge Base. Below is more information on each section.

<b>Locations</b>	This is the clinic location(s). This will show the current address of the clinic, the number of practitioners assigned to the clinic and its specialties (types of treatments). This information is pulled from the ClinicOffice database and can be updated there.
<b>Practitioners</b>	Displays all practitioners that the AI Receptionist can book an appointment against. The active appointment types they can perform are pulled from ClinicOffice. From this dashboard setting you can give the practitioner a nickname should you wish. You can also put more information about that practitioner and their specialties. The AI will use this as reference material.
<b>Appointment Types</b>	Displays all appointment types that the AI Receptionist can book a patient in for. This is also pulled through from ClinicOffice. From this dashboard setting you can put in additional information about that type of appointment, so that the AI can use it as reference should a patient enquire about what the treatment involves.

<b>Knowledgebase</b>	This is the area that you can put additional information in about your clinic that the AI can use as reference material. You can add your website and any documents that AI can read. You can also type in additional information by clicking the <b>'Type Information'</b> . For example, you can specify car park arrangements, insurance policies, drinking and eating before treatment, peak hours or any other information you feel is helpful to the patient.
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If you do not want the AI Receptionist to use one of the clinics, practitioners or appointment types, then just disable them by using the slider, top left of the record (as demonstrated below).



## Settings

From the BookedSolid Dashboard you can select **Settings** from the left-hand panel. Below is a table that is in no way an exhaustive reference to the **Settings** page, but it does reference points that are useful to know for your configuration within ClinicOffice.

<b>Account Setup</b>	Allow you to set the business name, the email address that any notifications get sent through to, such as when an appointment has been booked, and your time zone. You can also set whether the AI obtains the email and date of birth for new patients. You can set a cancellation window in hours and specify the clinic opening hours. The system does also allow you to specify the number of months that has passed before counting them as a new patient again.
<b>Call Handling</b>	<p>You can set the number that the call is transferred to, should the AI not be able to handle the query that the patient has. You can indicate that it should not do this if it is out of office hours.</p> <p>In addition to this, you can specify the starting message, the voice language and accent. You can also tell whether to store audio recordings.</p> <p>We do generally recommend that you disabled the option “Add background noise to calls”, unless you prefer your AI Receptionist to sound like they are in a very noisy office.</p>
<b>Notifications</b>	Specify what you want BookedSolid to email you with when a new appointment has been booked or when there has been a change to an existing booking.

<b>PMS Integration</b>	This is where you can copy and paste in your API key and customer reference. For more information on where to retrieve this information please reference the “ <a href="#">Setting up BookedSolid</a> ” section of this guide.
<b>Help &amp; support</b>	Useful in case you need any help with how to use the AI Receptionist that BookedSolid offers or if you encounter any problems with their service.

We do strongly recommend that after you have configured BookedSolid, to test the AI receptionist for yourself and to tweak it according to your needs.



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