

Run every office like your best office.

Simplify your business: consolidate your many vendors' capabilities on one platform. DailyOps sits on top of your PMS and takes the daily busywork off your teams (front desk, treatment, insurance, payroll and finance) with automation and AI doing the reading, matching and writing. **No more printing and no more Google Drive folders:** every form, signature and report lives in one place.

50+ hrs

of admin work saved per office, per week

+18 pts

higher treatment acceptance with automatic patient follow-ups

10+

separate tools and vendors replaced by one platform

WHAT IT RUNS, AT EVERY OFFICE

Front desk & daily close

Paperless intake on an iPad or phone, written back to your PMS.

Patient notes from calls and follow-ups land in the chart automatically.

End-of-day balancing and front desk checklists, the same at every office.

No clipboards, scanning or retyping.

Treatment & case acceptance

Plans built from your PMS, signed on an iPad or the patient's phone, with deposit links.

Automatic follow-ups and an evening recap for every doctor.

Fewer accepted plans go unscheduled.

Insurance & revenue cycle

Insurance EFTs and checks matched to your PMS, office by office.

Claims, verifications and eligibility in one shared queue.

Know every insurance dollar arrived.

Finance & bookkeeping

Bank, credit card and financing statements reconciled every month.

Card charges audited line by line; vendor invoices captured from email.

Month-end close without the spreadsheets.

Payroll, scheduling & HR

Location-verified time clock, PTO, bonuses, onboarding and credentials.

Monthly staff schedules built from your PMS provider hours.

Doctor and hygiene production reports submitted for pay, pulled from your PMS.

Payroll-ready timesheets, no chasing.

Recall & team performance

Live recall list from your PMS, plus automatic recall emails.

Every call, text and email tracked by team member, with bookings credited to who made them.

Doctor, hygiene and coordinator scorecards, updated all day.

See who's filling the schedule.

And many more features: plain-English patient balance explanations, staff suggestions that AI turns into fixes, message board and celebration cards, team training with quizzes, maintenance requests, supply inventory, referral directory and more.

AUTOMATION AND AI THAT DO THE WORK

Reads the paperwork. Bank, card and financing statements, insurance check scans and vendor invoices become data in seconds.

Writes the summary. Plain-English commentary on scorecards, bonuses and monthly reports.

Matches the money. Deposits, EFTs and payouts are lined up against your PMS; only exceptions reach a person.

Follows up for you. Treatment, recall and review emails go out on schedule, every day.

Builds the schedule. Flexible front desk and assistant shifts filled fairly, within hour limits.

Trains the team. Lessons and quizzes drafted from a manager's notes or a PDF.

One view, every office

Dashboards switch between one office and the whole group.

The right access

Nine roles, front desk to owner; owners can view as anyone.

Configured to fit each office

Its own PMS connection, payment account, goals, financing options and email lists.

HIPAA compliant

Patient-data access log, database-level permissions, no patient details in email.