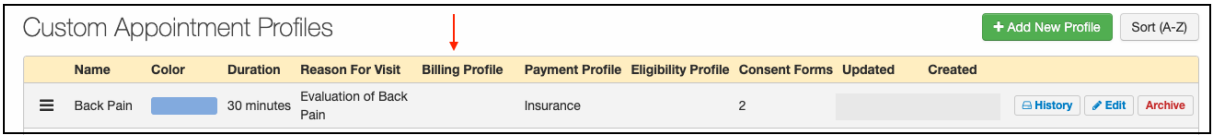
Connecting Billing and Appointment Profiles

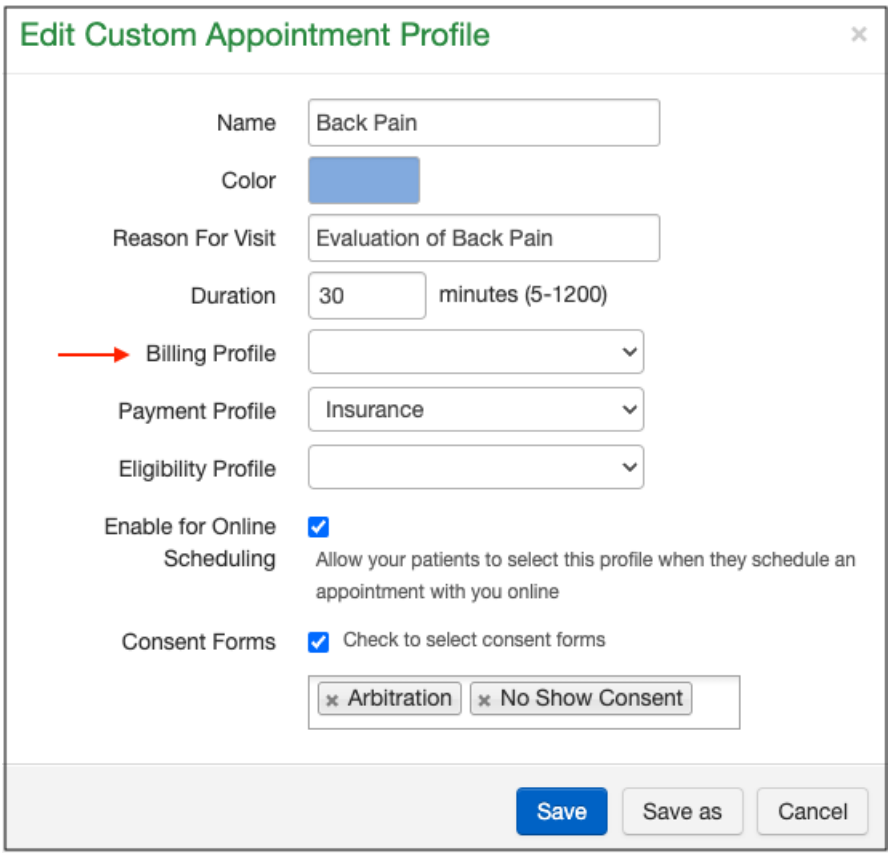
Last modified on 09/25/2026 4:41 pm EDT

Once you have created both a billing profile and an appointment profile, you can connect them. When connected, any appointment scheduled using an appointment profile will also have the billing codes associated with the appointment populated.

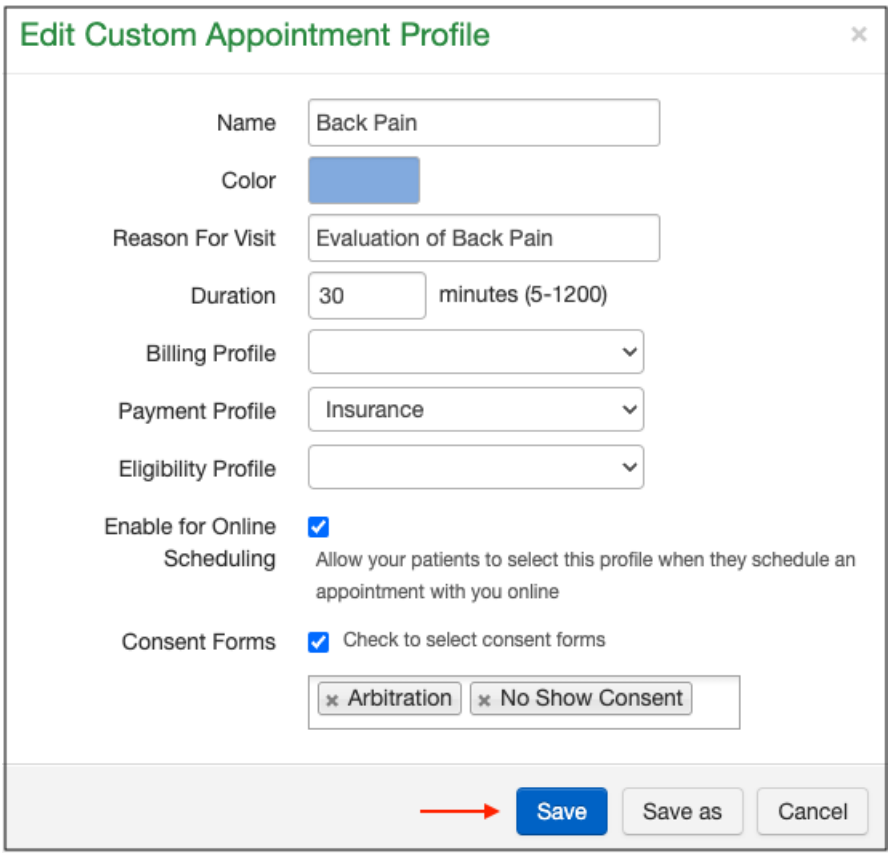
1. Navigate to **Schedule** > **Appointment Profiles**.
2. Under the **Billing Profile** column header, the profile is connected to the Appointment Profile.
3. Press **Edit** to open the appointment info.



4. Select the profile from the **Billing Profile** menu.



5. Press **Save** when finished.



6. Select the desired Appointment Profile from the **Profile** dropdown in the menu and **Save or Save & Close**. The appointment and billing information connected to the profile will populate the appointment window.

