Manage Practice Settings

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Practice Management | Offices | Facilities | Providers | Staff | Groups | Roles & Permissions | Dashboards

You can manage offices, facilities, providers, staff, groups, roles, permissions, and dashboards from one structured workspace—**General Management**.

Watch this quick demo to see the streamlined workflows for **Practice Management**.

Practice Management

From the **General Management** tab, you can manage offices, providers, staff, roles, permissions, role-based dashboards, groups, and facilities in a single structured workspace.

Go to General Management

Select **Account** > **Practice Management.** The **General Management** tab is open by default.

Related resources

- Manage Practice Settings (Video)
- Practice Management: Everything in One Place

Offices

Related articles

- Archive Offices
- Create Offices
- Edit Basic Office Information
- Edit the Office Billing Information
- Edit the Office Work Schedule
- Set Up the Office Online Schedule

Providers

Related articles

- Edit the Provider's Work Schedule
- Edit Provider and Staff Permissions
- Edit Provider and Staff Roles
- Manage the Provider List

Staff

Related articles

- Change the Primary Provider for Staff
- Create Staff Accounts
- Deactivate Staff
- Edit Provider and Staff Permissions
- Edit Provider and Staff Roles
- Edit Staff
- Reset Staff Passwords
- Restrict Staff to an Office

Roles & Permissions

Related articles

- Account Permissions Overview
- Create Custom Roles
- Edit Custom Roles
- System and Custom Roles

Dashboards

Create and manage practice-wide and role-specific dashboards.

Related articles

- Create Practice Dashboards
- Edit Practice Dashboards
- Manage Practice Dashboards

Facilities

Related articles

- Archive Facilities
- Create Facilities
- Edit Facilities

Groups

Related articles

- Create Groups
- Manage Groups
- Archive Groups