

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


When you go to **Account > Practice Management**, the **General Management** tab is open by default.

Related resources

- [Practice Management](#)
- [Manage Practice Settings \(Video\)](#)

Offices

Related articles

- [Create Offices](#)
- [Edit Basic Office Information](#)
- [Edit the Office Billing Information](#)
- [Edit the Office Work Schedule](#)
- [Set Up the Office Online Schedule](#)
- [Archive Offices](#)  [Ask for the PDF](#)

Facilities

Related articles

- [Create Facilities](#)
- [Edit Facilities](#)
- [Archive Facilities](#)

Providers

Related articles

- [Edit the Provider's Work Schedule](#)

- [Edit Provider and Staff Permissions](#) 📄 Ask for the PDF
- [Edit Provider and Staff Roles](#)
- [Manage the Provider List](#)

Staff

Related articles

- [Create Staff Accounts](#) 📄 Ask for the PDF
- [Edit Staff](#)
- [Edit Provider and Staff Permissions](#) 📄 Ask for the PDF
- [Edit Provider and Staff Roles](#)
- [Reset Staff Passwords](#)
- [Deactivate Staff](#) 📄 Ask for the PDF

Groups

Related articles

- [Create Groups](#)
- [Manage Groups](#)
- [Archive Groups](#)

Roles & Permissions

Related articles

- [Account Permissions Overview](#) 📄 Ask for the PDF
- [Create Custom Roles](#)
- [Edit Custom Roles](#) 📄 Ask for the PDF
- [System and Custom Roles](#) 📄 Ask for the PDF

Dashboards

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

Related articles

- [Create Practice Dashboards](#)
 - [Edit Practice Dashboards](#)
 - [Manage Practice Dashboards](#)
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