

Manage Practice Settings

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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 (the default tab when you open **Practice 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

- [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](#)
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