

Edit Practice Dashboards

Last modified on 04/14/2026 6:31 pm EDT

You can edit a practice dashboard from the General Management **Dashboards** page.

Edit a practice dashboard

1. Select **Account > Practice Management > General Management > Dashboards**.
2. Select **Edit** for the specific dashboard to open the **Edit Dashboard** side panel.

Dashboard	Type	Role	Actions
Billing	Practice	Billing Staff	Edit Delete
Front Office (Scheduling)	Practice	Office Manager Staff	Edit Delete
Demo	Practice	All Roles	Edit Delete

Showing 3 of 3 records

2. Make your changes and select **Save Dashboard**.

Edit Dashboard

Dashboard Name *

Role

Leave blank to grant access to everyone for this dashboard.

Widgets (Up to 5)

Provider

- Appointments
- Messages
- Tasks
- No Show Predictor

Billing

- Claim by Claims Status
- Patient Balance
- Post

Appointment Visibility

[Cancel](#) [Save Dashboard](#)