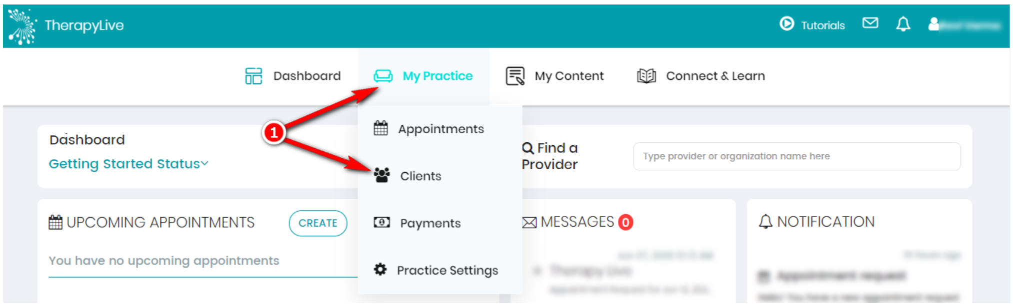
Can I view or export a list of my clients?

Customer Success Liaison - 2020-06-07 - in Managing Clients

To view a list of all of your clients, please follow the steps below:

1. Go to the “My Practice” tab located at the top navigation menu and click on “Clients”.



2. You can export the list of your clients in a variety of file formats, including CSV, XLSX, or PDF, by clicking on the icons located above the list.