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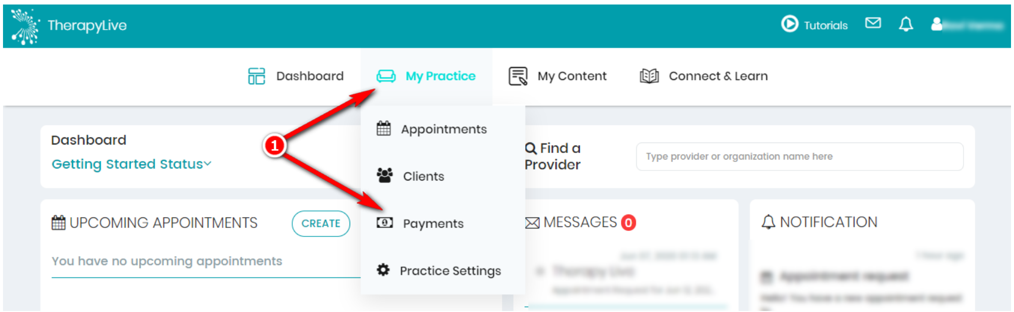
Customer Success Liaison - 2020-08-19 - in Billing and Payments

To access the payment details from your clients:

1. Click on “My Practice” and select “Payments” from the drop down menu. This page includes all the payments from your clients.



2. You can download your client’s payment history in Excel or PDF form by clicking on the icons located on the top right hand side.