Client Dashboard! *Updated!*

The Client Dashboard has been redesigned to allow for easier access to patient and transaction information!

Summary	
Invoices	1
Payments	1
Appointments	6 [F: 0]
Reservations	1 [F: 0]
Cancelled Appointments	0
No Show Appointments	1
Client Communications	0
Notifications	0
Documents	0

The menu on the left will allow you to view Summary Information, Invoices, Payments, Appointments, Reservations, Cancelled Appointments, No-Show Appointments, Client Communications, and notifications.

Appointments and Reservations will show with a total number as well as show the number of future appointments.

Future Appointments/Reservations will display as this: [F:1]

The Summary view will contain: Patients, Refills, Statement History, Client Credits, & Transaction History.

The Transaction History will show all transactions listed in chronological order.

These include invoices, payments, refunds, voids, deposits, credits, billing fees, and interest. From the transaction history you can also print or delete draft invoices, void payments, and deposits

Transaction History — Create Invoice | Client Payment | Payment | Deposit

Total Invoiced: $978.47 **Total Payments: $914.72** **Balance: $63.75**

From Date **To Date**

Patient	Date	ID	Transaction	Amount $	Status	Payment Method	Action
	12/23/2019		Billing Fee	(1.50)			
	12/23/2019		Interest Fee	(4.25)			
	11/28/2019	INV312241	Payment	914.72		External - Credi...	
	11/28/2019		Deposit	1.00		CareCredit - Cr...	
	11/26/2019		Billing Fee	(1.50)			
	11/18/2019		Billing Fee	(1.50)			
	11/15/2019		Billing Fee	(10.00)			
	11/14/2019		Billing Fee	(10.00)			
Charles	11/07/2019	INV312241	Invoice	(949.72)	Finalized		

1 - 9 of 9 items

The Client Communication tab will show the reminders sent through ePET Lite via SMS and Email. It will show Date, Sent Date, Patient, Communication Description and the Source.

Date	Sent Date	Patient	Communication Description	Source
	01/09/2020	Dumbo	We would like to remind you that Dumbo has an appointment at Colorado Location for 1/9/ 2020 10:00:00 AM.	SMS
	01/08/2020	Dumbo		EMAIL
	01/08/2020	Dumbo		EMAIL