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practice better

Getting Started on Practice Better

Quick Start Checklist

✅ My Profile, Company Profiles, 3rd Party Integrations
- ☐ Set up your Personal Profile
- ☐ Set up your Company Profile Connect
- ☐ your Google Calendar
- ☐ Set Up Practice Better Payments

✅ Forms and Waivers
- ☐ Create an online form from a pre-built template
- ☐ Create an online waiver from a pre-built template
- ☐ Create a disclaimer and add it to a service, package, or program

✅ Setting Up Your Services
- ☐ Create your first service

✅ Setting Your Availability
- ☐ Set up your availability

✅ Packages
- ☐ Create your first package

✅Booking Pages, Website Links & Widgets

- ☐ Preview and share links to your services, packages, or programs
- ☐ Create a custom booking page
- ☐ Connect your services, packages, or programs to your website
- ☐ Embed a widget on your website

✅Adding Clients and Client Records

- ☐ Create a client profile (we recommend creating a test client to start!)
- ☐ Invite clients to join Practice Better
- ☐ View your client's Recent Activity stream
- ☐ Create an automation to add/invite new clients

✅Messaging & Telehealth

- ☐ Send a message via the secure chat
- ☐ Set up a telehealth session
- ☐ Start a telehealth session
- ☐ Set up your Telehealth & Messaging preferences

✅Billing & Payments

- ☐ Create and send a client invoice
- ☐ Create a payment plan for a service, package, or program
- ☐ Create a custom payment plan for a client

✅Note Templates

- ☐ Create a note template from one of the pre-built templates
- ☐ Share a note with a client

✅Protocol Templates

- ☐ Create a protocol template
- ☐ Share a protocol with a client

✅Journals & Tasks

- ☐ Give client(s) access to Food & Mood and Lifestyle Journals
- ☐ Set journal targets for your client(s)
- ☐ Set your journal defaults and preferences
- ☐ Create a task for yourself and one for your client

✅Automations

- ☐ Set up an automation to confirm sessions or packages
- ☐ Set up an automation to send forms after a booking is confirmed

✅Notifications

- ☐ Set up your Notification Preferences
- ☐ Configure your client email notification templates

✅Platform Branding

- ☐ Set your brand colors
- ☐ Upload your company logo and favicon
- ☐ Set your subdomain name for your Personalized URL
- ☐ Upload your logo and personalize settings for your PDF branding

✅Snippets, Auto-Responder and Out-Of-Office

- ☐ Create a Snippet
- ☐ Set up your Autoresponder
- ☐ Set up your Out Of Office message

🗒️ Notes and Questions

Congratulations on completing your checklist! We're here to support you. Feel free to schedule a **Live Group Q&A Session** and get your questions answered. You can schedule and share your questions by **clicking here**.

👇 Where to Get Support

At Practice Better, we have many great resources to assist you:

- The quickest way to find answers to your questions is our extensive and user-friendly Help Center.
- You can contact our Customer Support team directly from your portal (click "Contact Support" in the bottom navigation bar). Or, you can go to this link directly to submit your questions.
- Visit our YouTube Channel with a variety of helpful Tutorial Videos and Deep Dive Webinars.
- If you are on one of our Paid Plans (starter, pro, plus, team), you have access to our private Inner Circle Facebook Group, which is a great way to find answers to your questions, as well as get support from your fellow Practice Better community members.

Please don't hesitate to reach out with any questions! We're here to support you during your set up process.

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