Finix payments · The basics

Navigating your Finix dashboard

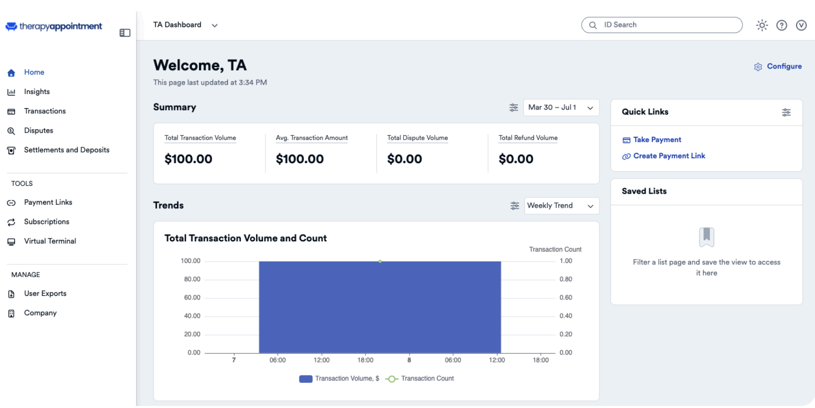
Your Finix dashboard is where payments live — activity, settlements, disputes, exports, and team permissions, all in one place.

What you can do from your dashboard

- View activity, individual transactions, and other payment data
- Track settlements and deposits to your account
- Track disputes and refunds
- Manage practice members and permissions **Group practice feature**

Your dashboard menu

Your dashboard opens on a quick heads-up view of insights. Use the left menu to go deeper.



The dashboard home view — the left menu is your way around. Click to enlarge.

Insights

The top "heads-up" view of your transactions: payments, refunds, and authorizations.

Transactions

View payments, authorizations, refunds, and bank returns. Filter by date and more.

Disputes

Any card charge disputed by patients shows up here.

Settlements and deposits

Deposits made into your bank account from Finix.

User Exports

Exports generated from any report's Export button.

Company

Your practice's account details.

- Company details and payment instruments
- Team — invites and user roles
- PCI Compliance forms

Common actions

Search for individual entries

Use **ID Search** (top of any page, used to search transactions. `Transactions` → `Payments`

Tip: In TA, click the individual payment and at the center top, copy the `ref #` to search.

Sort and filter your data

Filter and sort your data by **date**, **status**, and other properties by clicking the top filter.

Generate custom CSV exports

1. Use filters to compile the exact data you want to export
2. Click the `Export` on any report
3. Confirm which fields to export
4. Click the `Initiate Export`
5. In `User Exports`, download your file

Managing practice members and roles

Administrator accounts can manage role-based permissions for your practice's dashboard.

Add a team member

Company › Team

1. Click the Add New Team Member
2. Enter a name and email for the new team member
3. Select their roles and click Add Team Member

Your new practice member will receive an email to access their account.

Remove a team member

Company › Team

1. Click the team member you want to deactivate
2. On their page, click the ··· menu
3. Click Deactivate Team Member and confirm

Change a member's role

Company › Team

1. Click the team member whose role you want to change
2. On their page, click the ··· menu
3. Click Edit team member role

Working with custom roles

Create a custom role

Company › Team › Roles

1. Click Add Custom Role
2. Enter the custom role name and check off any permissions you want for it
3. Click Create role

Edit an existing role

Company › Team › Roles

1. Click the custom role
2. Click the ··· menu and choose Edit Role
3. Make your changes, then save