



Get the most out of

FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

Dashboard

User Guide

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Dashboard Overview

The Dashboards in FLEX show a graphical overview of useful data involved in the management of the Practice.

The Dashboard is selected on the left-hand side of the business intelligence screen.

Management can identify well-performing sectors, areas with room for growth, and those in need of development.

For each report the views can be customised to show one or all branches for **To-day**, this **Week**, this **Month**, this **Year**, by **Q1, Q2, Q3, Q4**, or the **Year to Date (YTD)** - all mapped around your financial year.

A bespoke date range can also be entered. The Year to Date goes from the start of your tax/accounting year, which can be changed in the Setup.

Reports

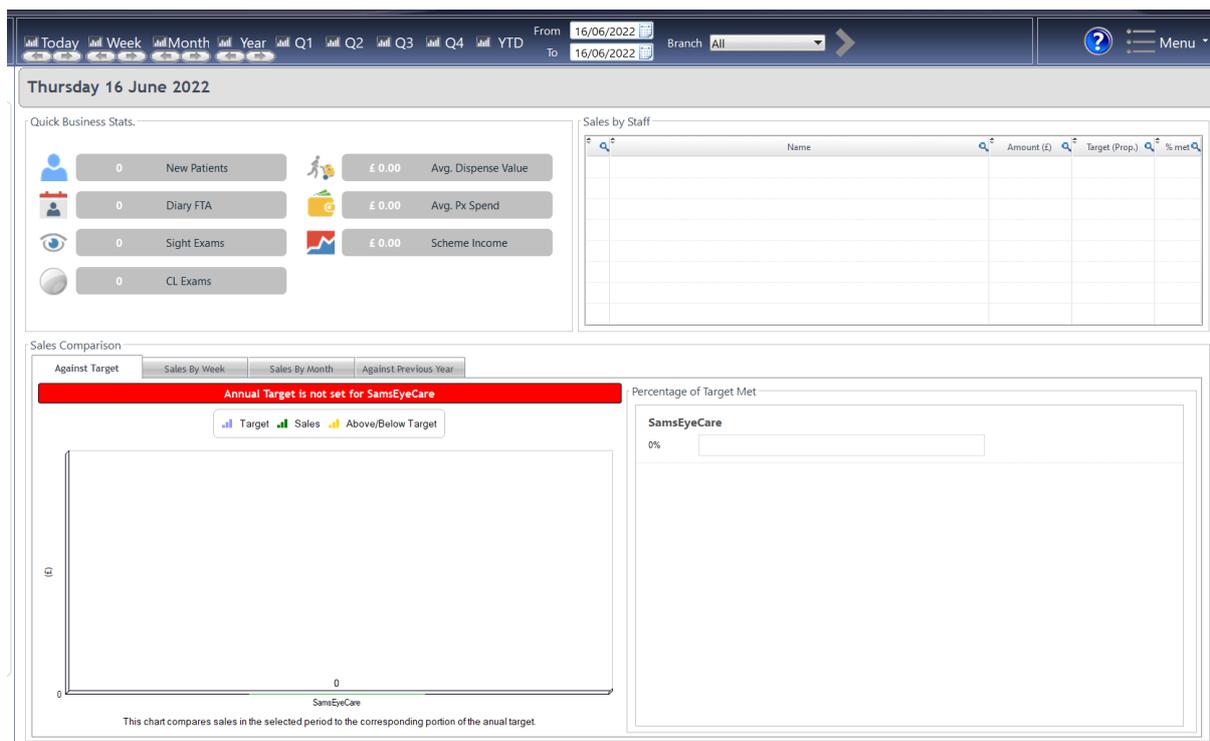
Business Performance

Drawing together key metrics into one place. Sales targets can be set against staff members/practices and '% met' is displayed in the dashboard. Tooltips explain how figures are calculated.

To set the Branch target, navigate to [Menu - Setup - Branch - Integration tab](#).

To set the Staff targets, navigate to [Menu - Setup - Staff / Roles](#) (Please call helpdesk if you require help with this)

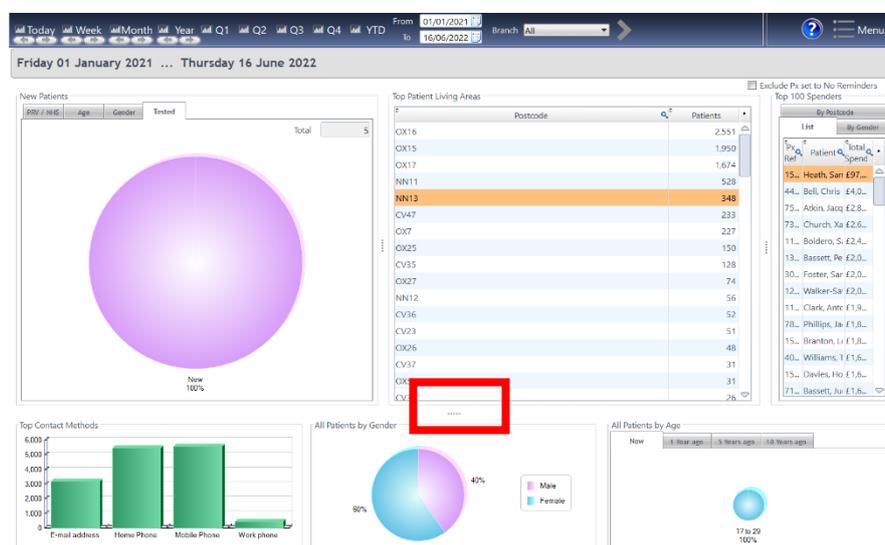
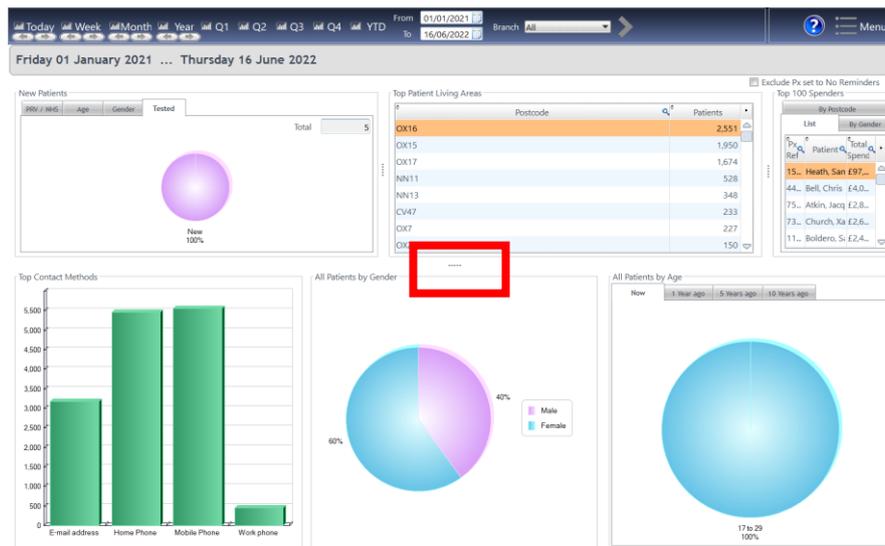
To run this report, select the relevant time periods and click on the > to the side of branch on the blue bar at the top, which will run the report.



Patients

Again, choosing the relevant time periods and clicking on the > to the side of branch on the blue bar at the top, will run the report.

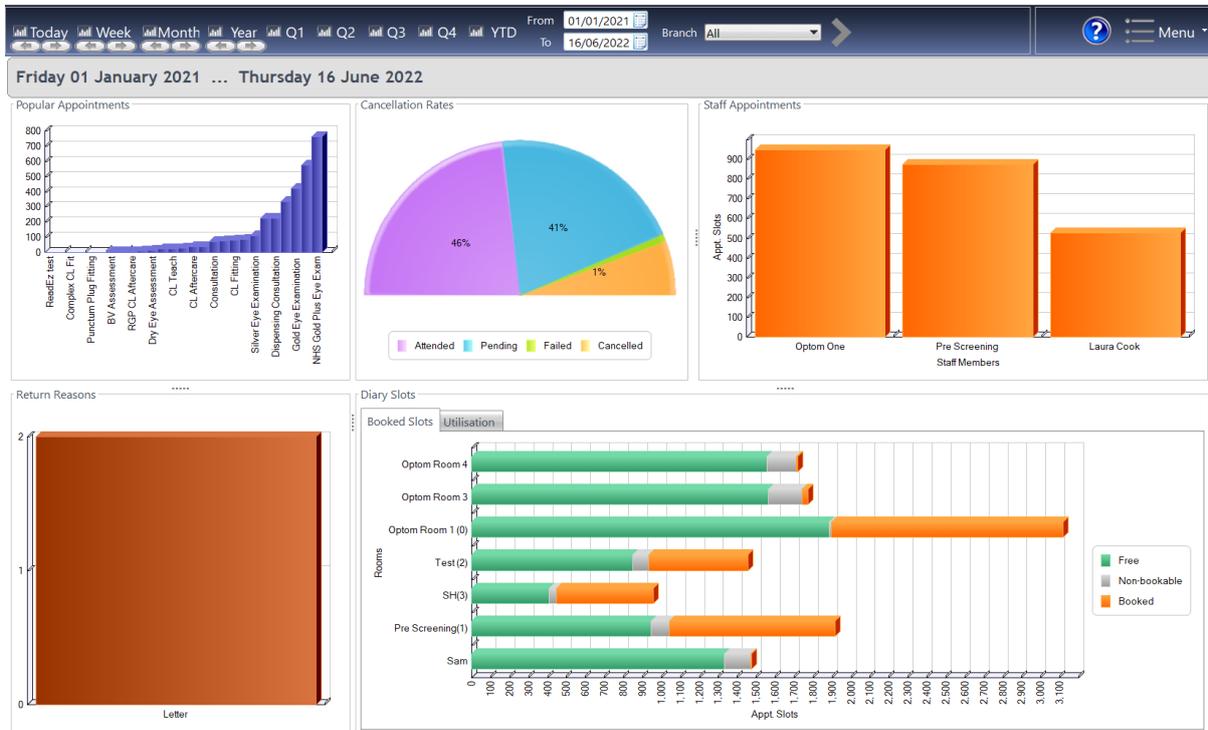
This will produce data in figures and graph format. (In the centre there are dots (outlined in red on the screenshot) this will move the screen up and down to show more data depending on the direction.



Appointments

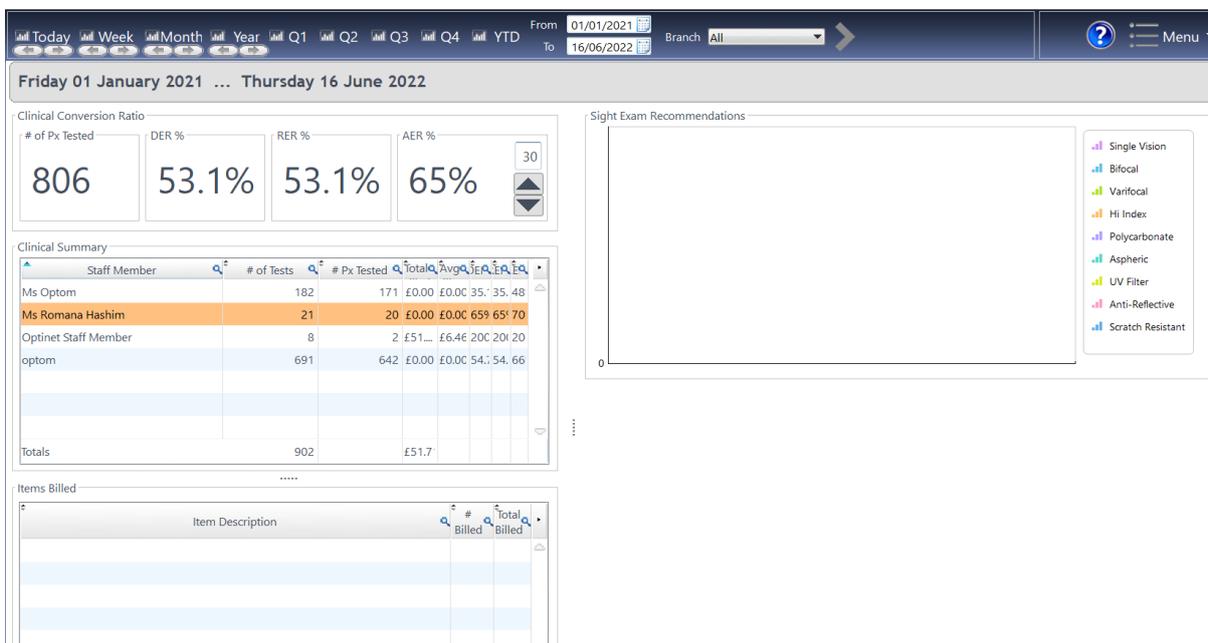
If you have online booking as well as the standard Flex appointment booking, this report will break each down for you.

If you don't have online booking, you will be able to see statistics regarding your practice appointment bookings.



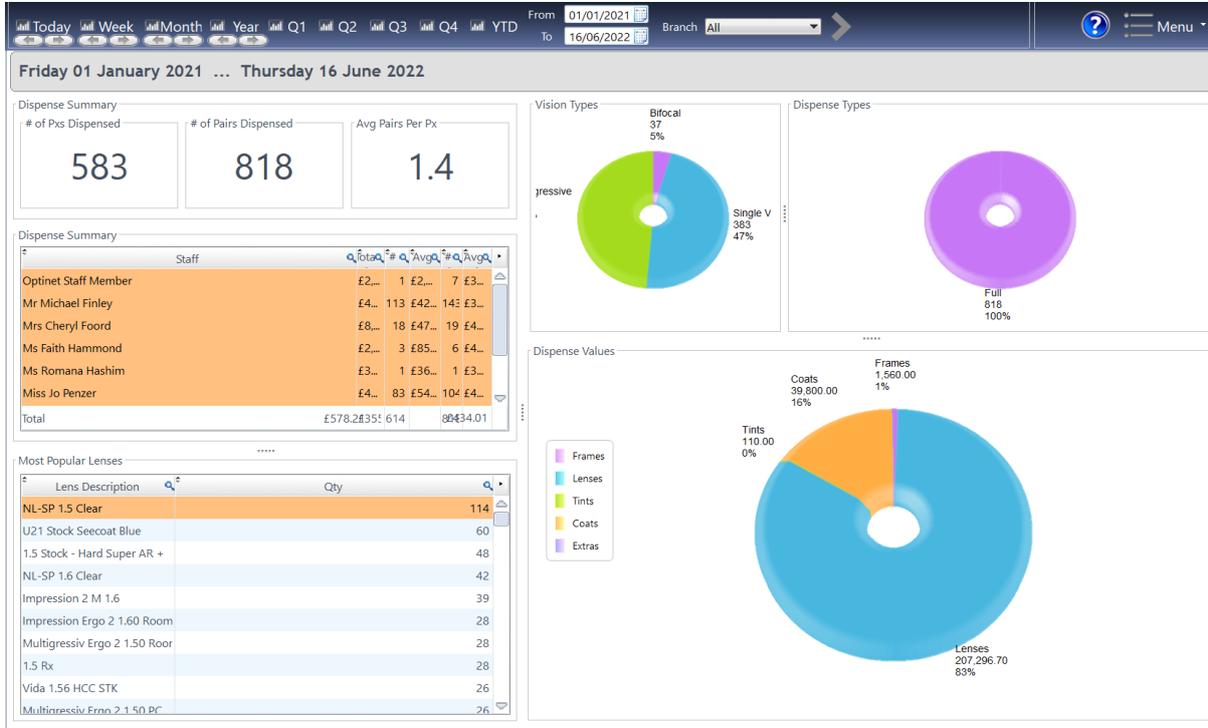
Clinical Summary

The clinical report will show clinical conversion ratios, patient tests, etc any items billed, and any recommendations made.

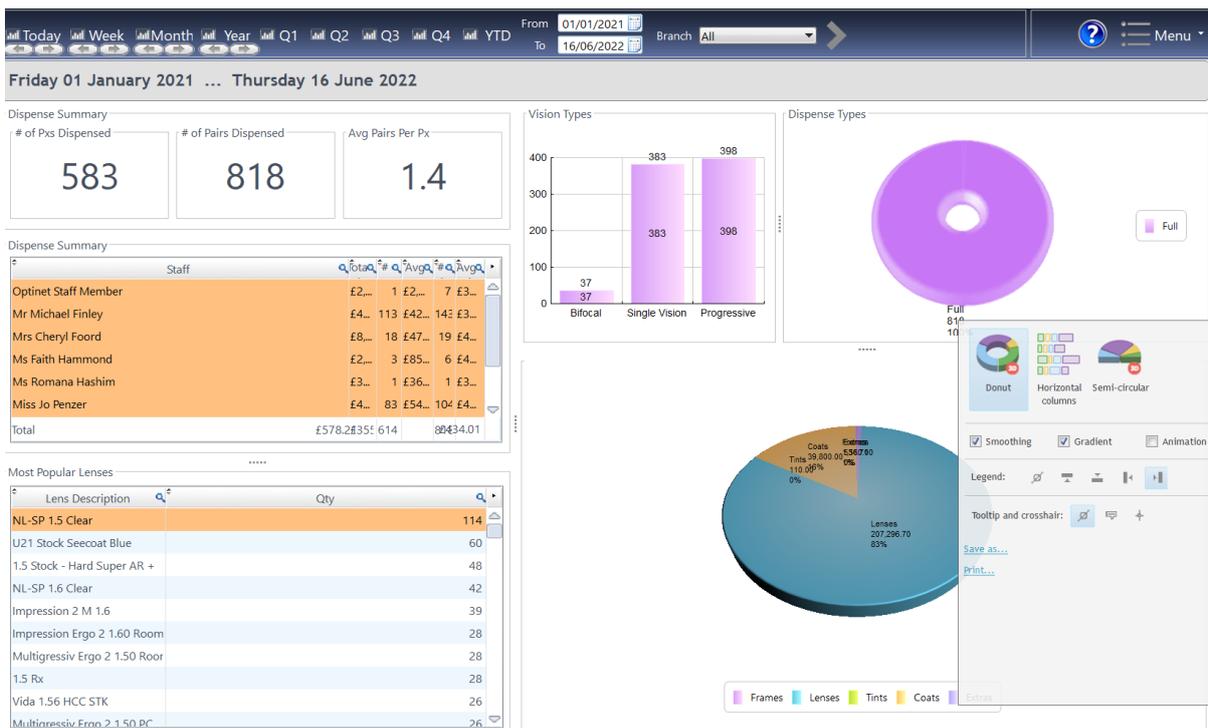


Dispense

Dispense, much like clinical summary will give you statistics in numerical and graph format.



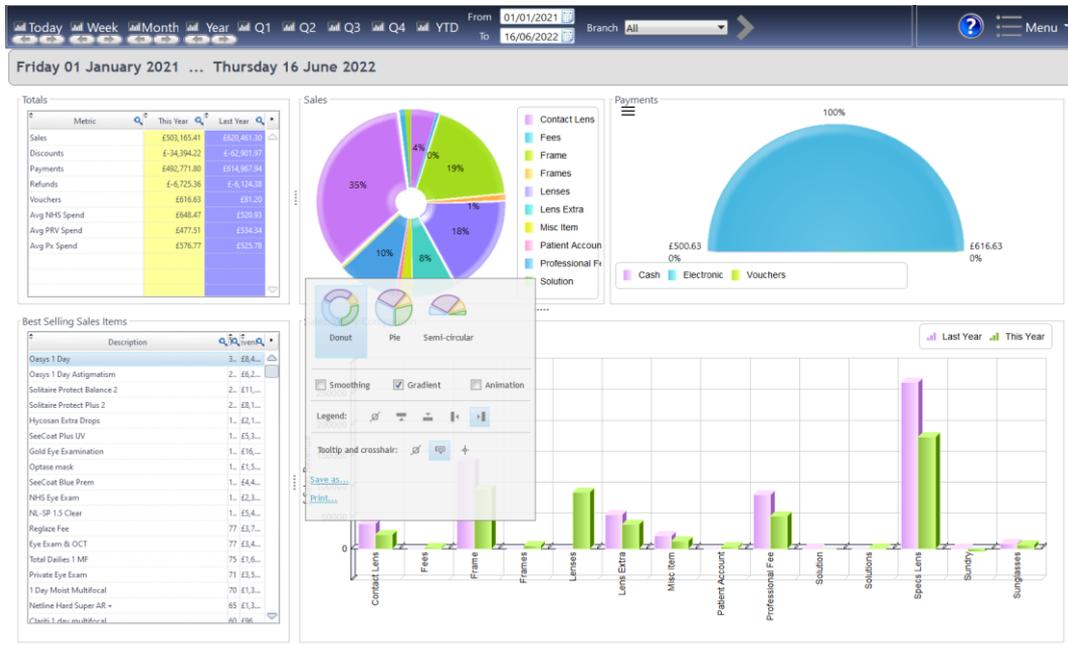
All the graphs themselves can have the design changed by **right clicking** on them once the report has been run. The same report as above but with the graphics changed...



Till

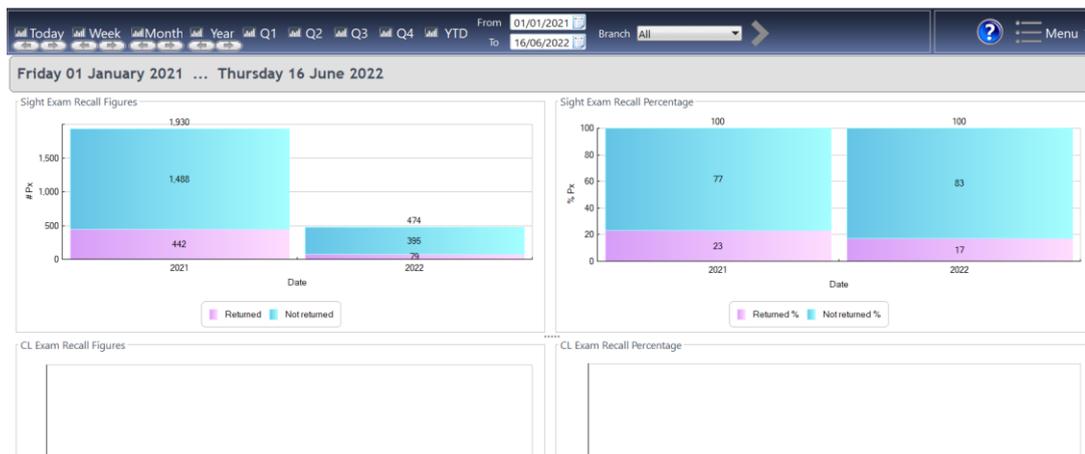
The summary here will show totals, sales, payments, the bestselling items, and sales by yearly comparison.

The design of these graphs can be changed by right clicking.



Recall

The recall report will show at a glance your conversions from recall sight test and Contact Lens returns and those who haven't returned.



The more you use FLEX, the more populated and therefore accurate these figures will be. Clicking on each one as you go down the list on the left, will give you all the analytical information you should need.