

# Get the most out of

# ADVANCED PRACTICE MANAGEMENT SOFTWARE

# Dashboard User Guide

# Contents

D	ashboard Overview	3
R	eports	4
	Business Performance	4
	Patients	5
	Appointments	6
	Clinical Summary	6
	Dispense	7
	тіш	8
	Recall	8

Page 2

## 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.

Page.

## 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 <u>Menu - Setup - Branch - Integration tab.</u>

To set the Staff targets, navigate to <u>Menu - Setup - Staff / Roles</u> (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.

ļ	Met Today         Met Week         Met Month         Met Year         Met Q1         Met Q2         Met Q3         Met Q4         Met YTD         To         16/06/2022           Met Today         Met Q4         Met YTD         To         16/06/2022         To         16/06/2022	🖥 Branch All 🔽 🔪 🦢 Menu -						
	Thursday 16 June 2022							
	Quick Business Stats.	aff						
	0 New Patients	Name Q, Amount (£) Q, Target (Prop.) Q, % met Q						
	😧 0 Diary FTA  🤠 🕯 0.00 Avg. Px Spend							
	O Sight Exams £ 0.00 Scheme Income							
	O CL Exams							
Sales Comparison								
Against Target Sales By Week Sales By Month Against Previous Year								
Annual Jarget is not set for samskyetare Precentage of larget met								
		0%						
	3)							
	0 SameEveCare							
	This chart compares sales in the selected period to the corresponding portion of the anual target.							

age'

#### 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.



Male Female

> 17 to 29 100%

#### 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.

Mail Today Mail Week Mail Month Mail Year Mail Q1 Mail Q2 Mail Q3 Mail Q4 Mail YTD To 16/06/2022 🗃 Branch All										
Friday 01 January 2021 Thursday 16 June 2022										
Clinical Conversion Ratio	% 53.19	<sup>Aer</sup> % 30 €5% €	Sight Exam Recommendations	al Single Vision al Bifocal al Vanfocal al Hi Index						
Clinical Summary           Staff Member            Ms Option	* # of Tests • # Px 182	Tested Q TotalQ AvgQ 5EQ EQ EQ €Q •		al Polycarbonate al Aspheric al UV Filter al Anti-Reflective						
Optinet Staff Member optom	8	2 £51 £6.46 200 20 20 642 £0.00 £0.00 54.7 54. 66	0	al Scratch Resistant						
Totals	902	£51.7 <sup>-</sup>								
Items Billed		3								
° Item D	Description	م <sup>#</sup> Billed Billed Billed ه								

Page**b** 

#### 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...

MToday MWeek MMonth MYear	■ Q1 ■ Q2 ■ Q3	Maq4 Matytd	om 01/01/2021 🗊 To 16/06/2022 🗊 Branch All	🕐 🚞 Menu *						
Friday 01 January 2021 Thursday 16 June 2022										
to f Pxs Dispensed of Pairs Dispensed 81	Avg Pairs Pa	er Px 1.4	ision Types Dispense Types							
Dispense Summary <sup>2</sup> Staff Optinet Staff Member Mr Michael Finley	ସ୍ ତିtaସ୍ <sup>4</sup> # ସ୍ £2, 1 £4 113 ୫	Avg <b>q,<sup>‡</sup>#q,</b> Âvg <b>q, →</b> :2, 7 £3 △	00 37 01 37 Bfical Single Vision Progressive	Full						
Mrs Cheryl Foord Ms Faith Hammond Ms Romana Hashim Miss Jo Penzer	£8, 18 £ £2, 3 £ £3 1 £ £4 83 £	247 19 £4 285 6 £4 236 1 £3 254 104 £4 🗢		Donut Circular columns						
Total	£578.2£355 614	854(34.01	Coalts Extense Time 39 000 00 5587 00 110 00%	Smoothing Gradient Animation						
*     Lens Description     Q <sup>2</sup> NL-SP 1.5 Clear     U21 Stock Seecoat Blue       1.5 Stock - Hard Super AR +       NL-SP 1.6 Clear       Impression 2 M 1.6       Impression Ergo 2 1.60 Room       Multigressiv Ergo 2 1.50 Roor       1.5 Rx	Qty	<ul> <li>•</li> <li>114</li> <li>60</li> <li>48</li> <li>42</li> <li>39</li> <li>28</li> <li>28</li> <li>28</li> <li>28</li> <li>28</li> <li>28</li> </ul>	0% 207.26.70 8.3%	Rotip and crosshalr: $\mathcal{A} = +$						
Vida 1.56 HCC STK Multioressiv Fron 2.1.50 PC		26 26 🛡	Frames Lenses Tints Coats	Extras						

Page

#### 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.

Page