Front Desk 2018
Practice Management System
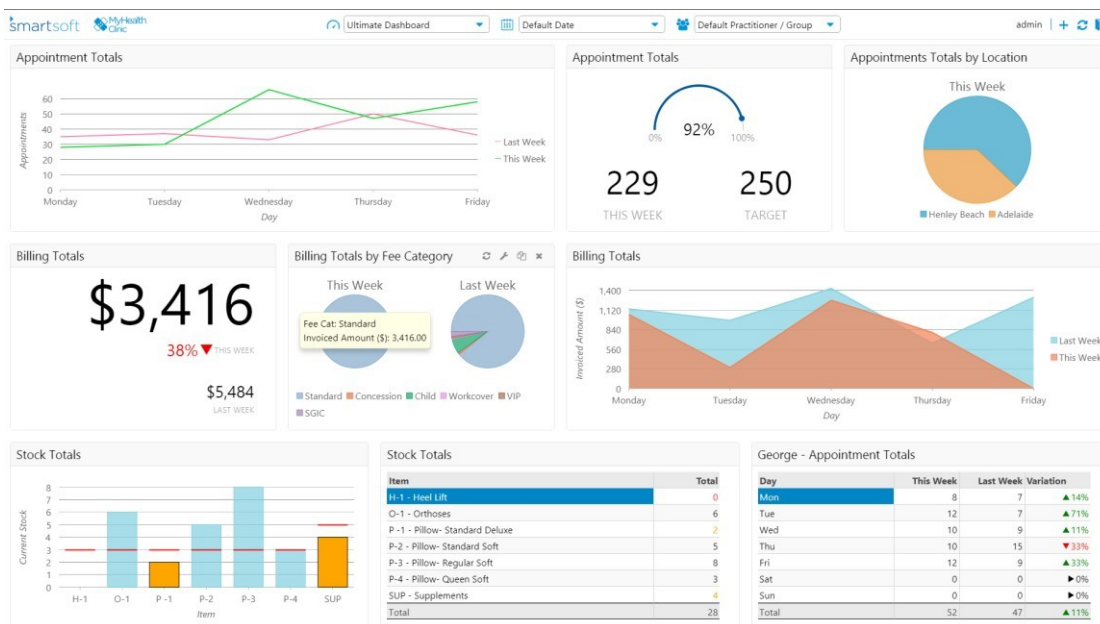
Front Desk Insights Dashboard – User Guide

Contents

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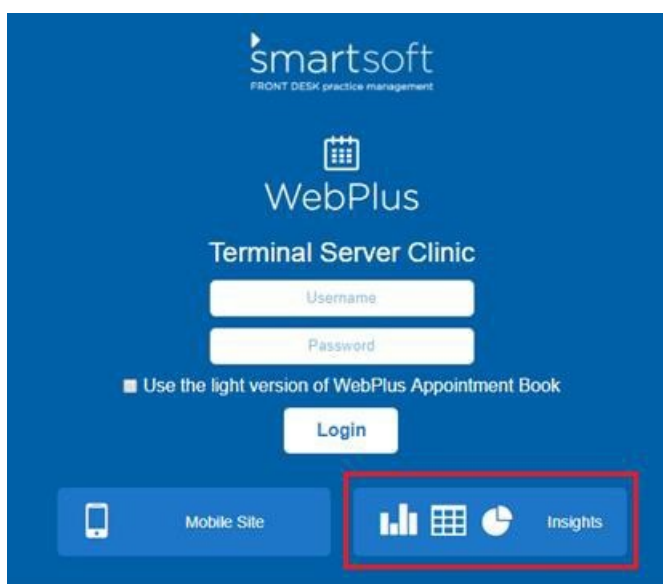# FRONT DESK INSIGHTS

Overview

Front Desk Insights Dashboard is a new reporting dashboard that allows users to create customisable widgets and present their practice management data as graphs, tables and KPI metrics. This online application is available to Front Desk users at no cost and provides live business intelligence, offering clear and flexible feedback on day-to-day business operations.

Front Desk Insights Dashboard functionality available in Web Appointment Book version 7 or higher.

Accessing Front Desk Insights Dashboard

To access Front Desk Insights Dashboard, visit the login screen of your Web Appointment Book and select the insights button. The Web Appointment Book login screen can be accessed in a web browser by navigating to http://localhost/FrontDesk/Dashboard. Alternatively, you can replace 'localhost' with the local IP address or the computer name.
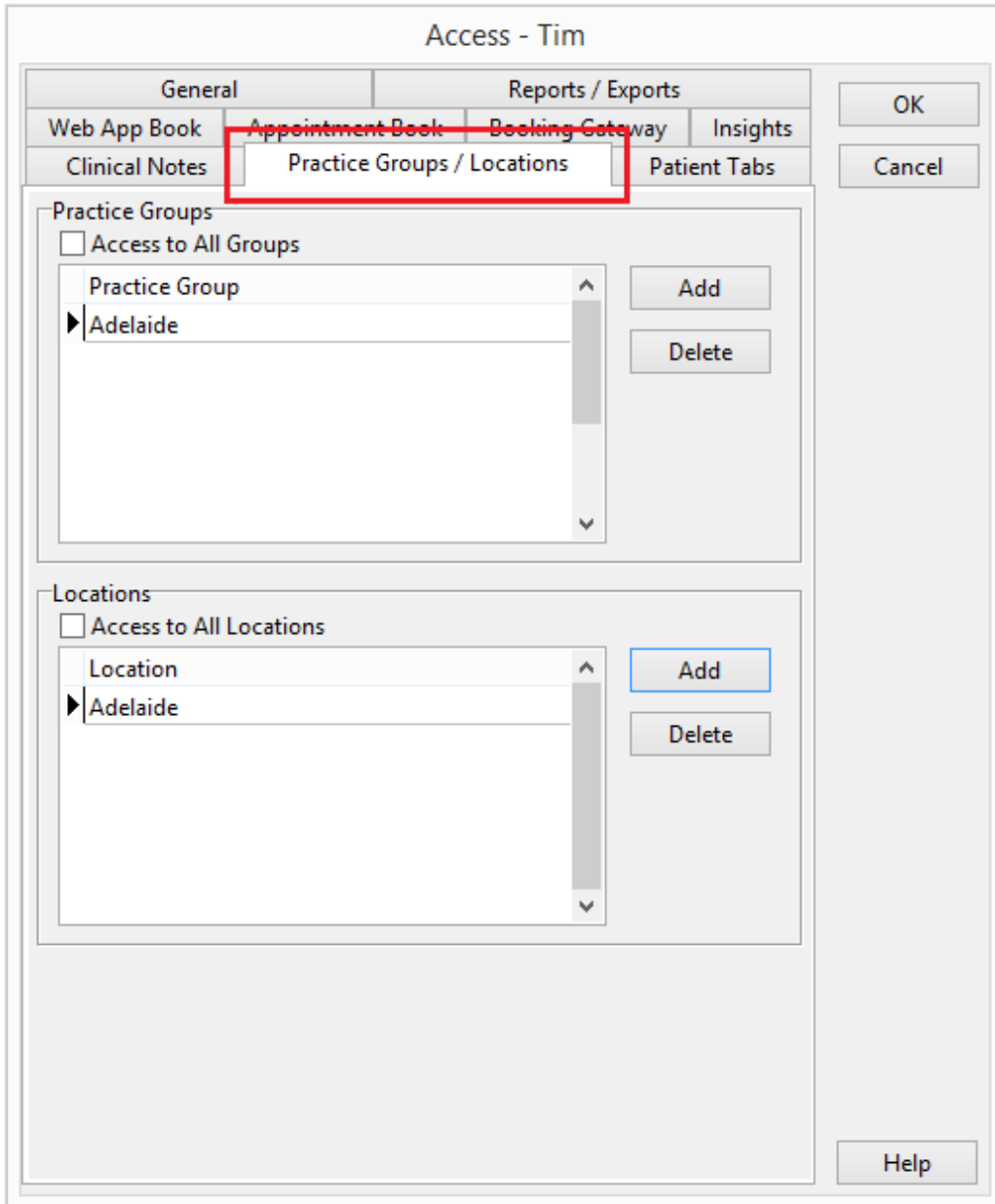
FRONT DESK INSIGHTS

User Access

After installation, Front Desk Insights Dashboard can only be accessed by the Admin user. We recommend using the Admin account to explore, setup and familiarise yourself with Front Desk Insights Dashboard.

For other users, access to Front Desk Insights Dashboard is provided on a per dashboard basis under the Insights tab in Front Desk from **System > Security > Access**. A user can either have full or read only access to the dashboards made available to them.

User Access

It is important to note that a Front Desk Insights Dashboard user will only have access to practice groups and locations as specified within the **Practice Groups/Locations** tab.
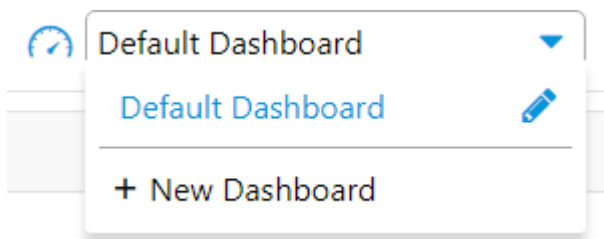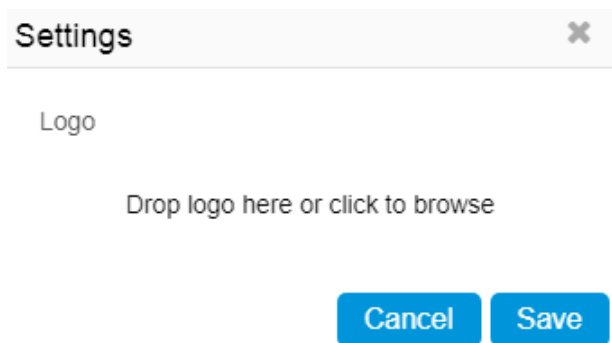
Creating and Editing Dashboards

Front Desk Insights Dashboard includes a single default dashboard. Additional dashboards can be created for different purposes, such a location or practitioner specific dashboard, or for different business roles
i.e. practice manager, practitioner etc.

To add a new dashboard, select the dropdown menu at the top of the screen and select New Dashboard. To edit existing dashboards, select the pencil icon.

To add your clinic logo to all dashboards, select 'click to add your logo' in the top left. You can drag and drop your clinic logo onto this screen or click to browse.

When adding or editing dashboard, you can customise the following properties:
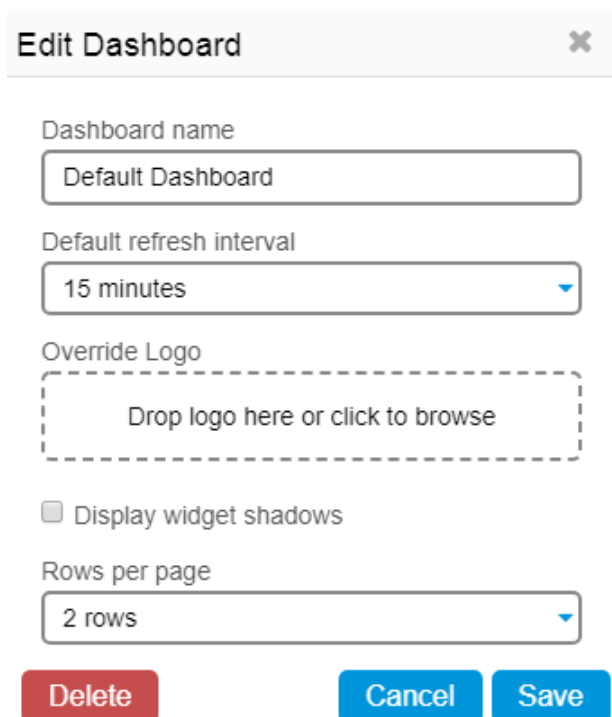
Adding Widgets

Adding widgets to your dashboards is as simple as clicking the + icon in the top right of the screen. Here, you'll also find options to refresh the selected dashboard, switch to full screen view and to logout.

To add widgets, select the + icon. Front Desk Insights Dashboard includes several types of widgets that can be customised in many ways.

- Appointment Totals & Breakdown
- Utilisation Totals & Breakdown
- Patient Visit Average Totals & Breakdown
- Appointment Report
- Billing Totals & Breakdown
- Stock Levels

The data that these widgets report on can be viewed in various ways:

Widget

After selecting the widget type, you'll be able to start customising your widget name and selecting what type of widget to add. Widgets have three key areas that can be customised:
- Date – Select a primary and comparison date range (optional)
- Filters – Select what data should be included in the widget
- Display – Selected how the data should be presented in the widget

Select Add to drop the widget into your dashboard.

When mousing over a widget, you can choose to refresh the data, edit settings, duplicate and delete.

The quick select options at the top of the dashboard can be used at any time to temporarily override the date range and practitioner/group of all widgets on a dashboard.