

### ADDING TODAY'S APPOINTMENTS TO YOUR DASHBOARD

Follow the steps below to create a visual report graphic showing the current day's Appointments.

Start by clicking on the Dominion VUE logo. From the home page, select an existing Dashboard by clicking on the far-right caret next to Unassigned Reports (or the current Dashboard name), or create a new Dashboard by clicking [ **New** ] and entering a name and click [ **Create** ].

Click the [ **Add Report** ] button in the Action Ribbon.

### ON THE REPORT TAB

1. **Report Basis** - Select [ Appointments ]
2. **Report Title** - "Today's Appointments"
3. **Default View** - Number

### ON THE FILTERS TAB

1. Set **Background Color** - White
2. Specify Number 1 as [ **Units Count** ]
3. Leave **Upper Text** Blank **Lower Text** "Service Missed"
4. Click [ **Add Condition** ]
5. Set [ **Appointment** ] [ = ] [ **Missed** ]
6. Click [ **Add Condition** ]
7. Set [ **Type** ] [ = ] [ **Service** ]
8. Specify Number 2 as [ **Units Count** ]
9. Leave **Upper Text** Blank **Lower Text** "Service Remaining"
10. Click [ **Add Condition** ]
11. Set [ **Appointment** ] [ = ] [ **Future** ]

Dashboard Manager

Report	<b>Background Color</b> <input type="text" value="White"/>																		
Filters	<a href="#">Add Condition</a>																		
List	<table border="0"> <tr> <td style="padding: 2px;"><b>Number 1</b></td> <td style="padding: 2px;"><input type="text" value="Units Count"/></td> <td style="padding: 2px;"><b>Upper Text</b></td> <td style="padding: 2px;"><input type="text" value=""/></td> <td style="padding: 2px;"><b>Lower Text</b></td> <td style="padding: 2px;"><input type="text" value="Service Missed"/></td> </tr> <tr> <td style="padding: 2px;"></td> <td style="padding: 2px;"><input type="text" value="Appointment"/></td> <td style="padding: 2px;"></td> <td style="padding: 2px;"><input type="text" value="="/></td> <td style="padding: 2px;"></td> <td style="padding: 2px;"><input type="text" value="Missed"/></td> </tr> <tr> <td style="padding: 2px;"></td> <td style="padding: 2px;"><input type="text" value="Type"/></td> <td style="padding: 2px;"></td> <td style="padding: 2px;"><input type="text" value="="/></td> <td style="padding: 2px;"></td> <td style="padding: 2px;"><input type="text" value="Service"/></td> </tr> </table>	<b>Number 1</b>	<input type="text" value="Units Count"/>	<b>Upper Text</b>	<input type="text" value=""/>	<b>Lower Text</b>	<input type="text" value="Service Missed"/>		<input type="text" value="Appointment"/>		<input type="text" value="="/>		<input type="text" value="Missed"/>		<input type="text" value="Type"/>		<input type="text" value="="/>		<input type="text" value="Service"/>
<b>Number 1</b>	<input type="text" value="Units Count"/>	<b>Upper Text</b>	<input type="text" value=""/>	<b>Lower Text</b>	<input type="text" value="Service Missed"/>														
	<input type="text" value="Appointment"/>		<input type="text" value="="/>		<input type="text" value="Missed"/>														
	<input type="text" value="Type"/>		<input type="text" value="="/>		<input type="text" value="Service"/>														
Parameters	<a href="#">Add Condition</a>																		
	<table border="0"> <tr> <td style="padding: 2px;"><b>Number 2</b></td> <td style="padding: 2px;"><input type="text" value="Units Count"/></td> <td style="padding: 2px;"><b>Upper Text</b></td> <td style="padding: 2px;"><input type="text" value=""/></td> <td style="padding: 2px;"><b>Lower Text</b></td> <td style="padding: 2px;"><input type="text" value="Service Remaining"/></td> </tr> <tr> <td style="padding: 2px;"></td> <td style="padding: 2px;"><input type="text" value="Appointment"/></td> <td style="padding: 2px;"></td> <td style="padding: 2px;"><input type="text" value="="/></td> <td style="padding: 2px;"></td> <td style="padding: 2px;"><input type="text" value="Future"/></td> </tr> </table>	<b>Number 2</b>	<input type="text" value="Units Count"/>	<b>Upper Text</b>	<input type="text" value=""/>	<b>Lower Text</b>	<input type="text" value="Service Remaining"/>		<input type="text" value="Appointment"/>		<input type="text" value="="/>		<input type="text" value="Future"/>						
<b>Number 2</b>	<input type="text" value="Units Count"/>	<b>Upper Text</b>	<input type="text" value=""/>	<b>Lower Text</b>	<input type="text" value="Service Remaining"/>														
	<input type="text" value="Appointment"/>		<input type="text" value="="/>		<input type="text" value="Future"/>														

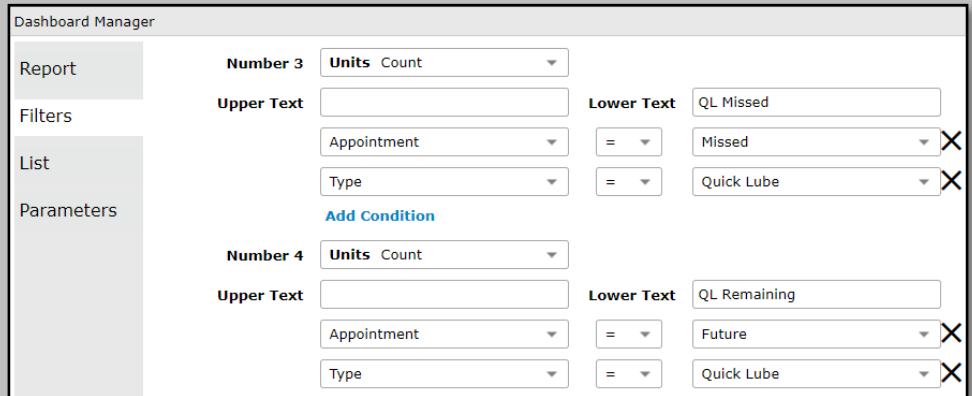
For Technical Support, please contact: 1.800.227.8187 or email dmssupport@dominiondms.com

### ON THE FILTERS TAB

12. Specify Number 3 as [Units Count]
13. Leave **Upper Text** Blank **Lower Text** "QL Missed"
14. Click [ **Add Condition** ]
15. Set [ **Appointment** ] [ = ] [ **Missed** ]
16. Click [ **Add Condition** ]
17. Set [ **Type** ] [ = ] [ **Quick Lube** ]
18. Specify Number 4 as [Units Count]
19. Leave **Upper Text** Blank **Lower Text** "QL Remaining"
20. Click [ **Add Condition** ]
21. Set [ **Appointment** ] [ = ] [ **Future** ]

22. Click [ **Add Condition** ]

23. Set [ **Type** ] [ = ] [ **Quick Lube** ]



The screenshot shows the 'Dashboard Manager' interface with a sidebar on the left containing 'Report', 'Filters', 'List', and 'Parameters'. The main area displays two filter conditions:

- Condition 3:**
  - Number 3: Units Count
  - Upper Text: (Blank)
  - Lower Text: QL Missed
  - Appointment: Appointment
  - Type: Type
  - Operator: =
  - Value: Missed
- Condition 4:**
  - Number 4: Units Count
  - Upper Text: (Blank)
  - Lower Text: QL Remaining
  - Appointment: Appointment
  - Type: Type
  - Operator: =
  - Value: Future

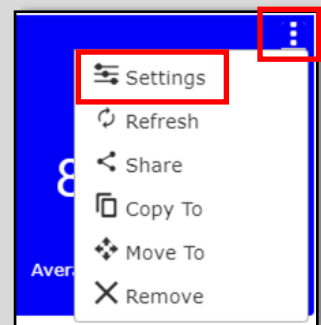
Each condition has an 'Add Condition' button and a close button (X).

### ON THE PARAMETERS TAB

1. **Report Title** [ Today's Appointment's ]
2. **Companies** [ Select Companies to include ]
3. **Advisor** [ All or select individual ]
4. **Appointment Status** [ All ]
5. **Date Type** [ Preset Date Range ]
6. **Date Range** [ Today ]

Click [ **Save** ]

Each Dashboard Report may be edited by clicking on the three ellipses in the upper right corner and clicking on Settings. Contact Customer Support for details to create personalized Dashboards.



For Technical or Software Support, please contact:  
 1.800.227.8187 or email [dmssupport@drivedominion.com](mailto:dmssupport@drivedominion.com)