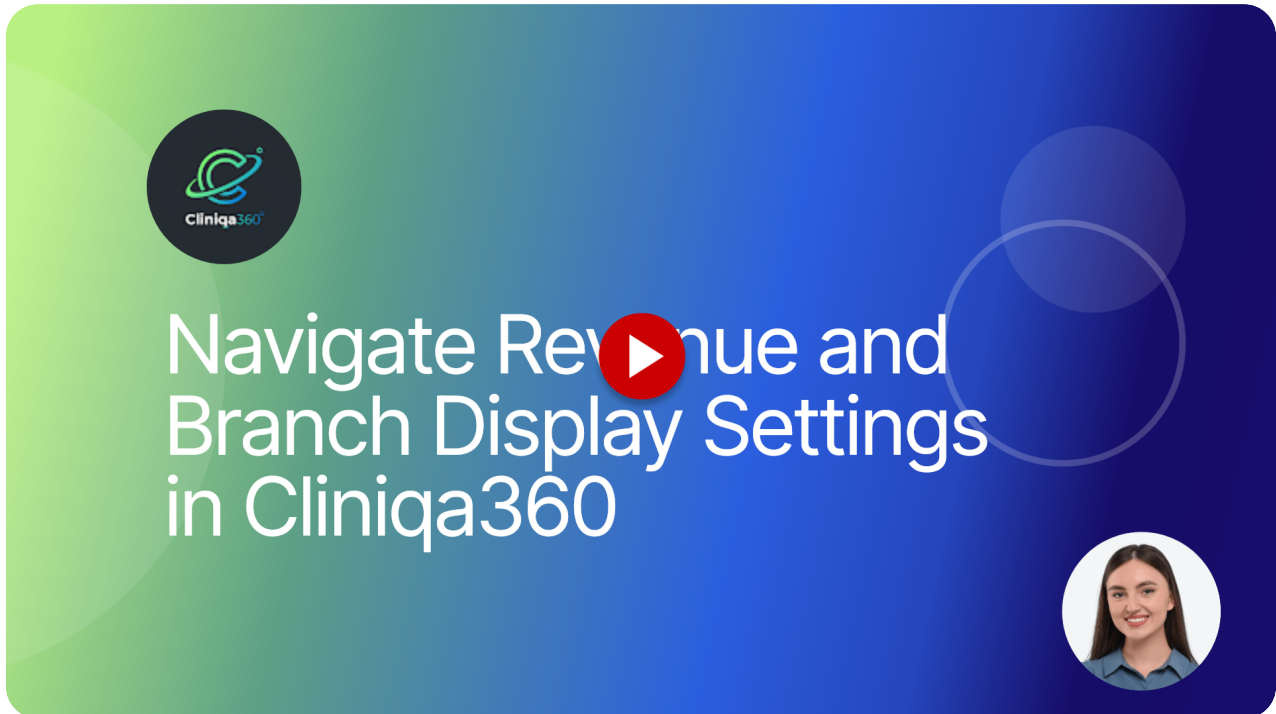




Navigate Dashboard in Cliniqa360

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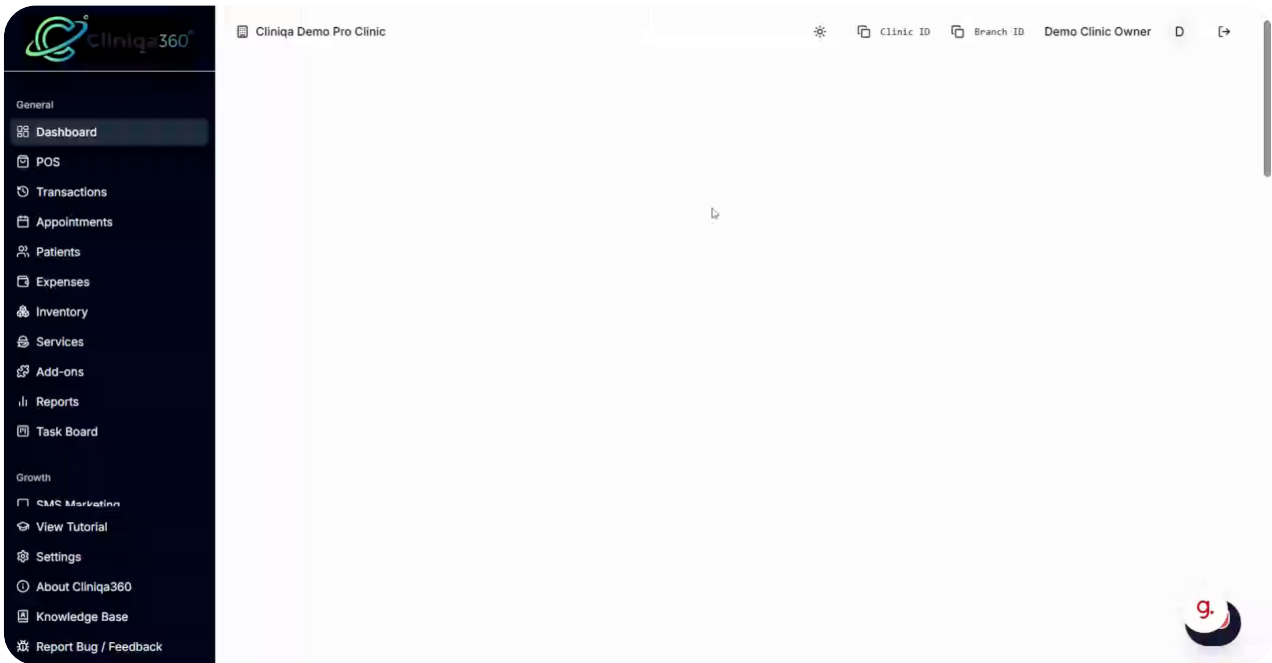


This tutorial guides you through accessing and managing revenue and branch settings within the Cliniqa360 Clinic Management Platform.

Go to app.cliniqa360.com

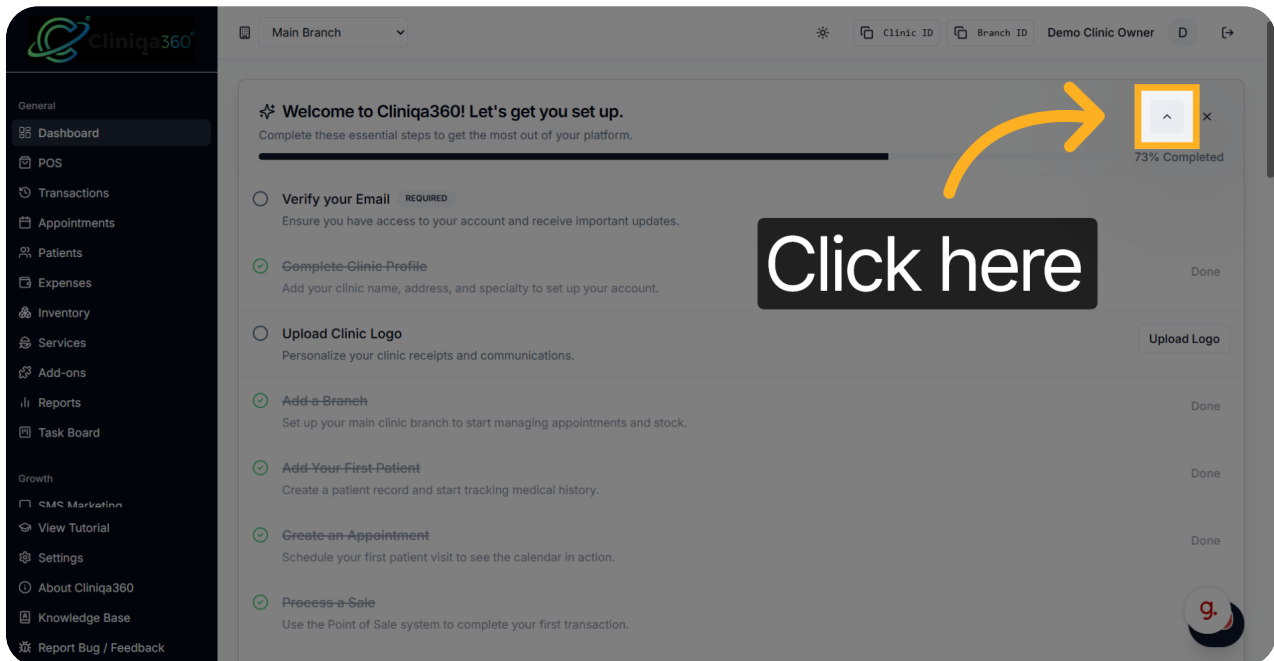
01 Introduction

You will learn how to view financial summaries and adjust branch display options effectively.



02 Access Main Dashboard

Click here to minimize the onboarding checklist in the dashboard of Cliniqua360.



03 View Total Revenue Summary

View the total revenue section to see detailed financial information including yearly revenue, net income, and today's sales.

The screenshot displays the Cliniqua360 dashboard for the 'Main Branch'. The top navigation bar includes 'Main Branch', 'Clinic ID', 'Branch ID', and 'Demo Clinic Owner'. The date range is 'Apr 01, 2026 - Apr 30, 2026'. A dark sidebar on the left contains various menu items such as 'Transactions', 'Appointments', 'Patients', 'Expenses', 'Inventory', 'Services', 'Add-ons', 'Reports', 'Task Board', 'Growth', 'SMS Marketing', 'View Tutorial', 'Settings', 'About Cliniqua360', 'Knowledge Base', and 'Report Bug / Feedback'. The main content area features a 'Dashboard' header and a grid of summary cards. A yellow box highlights the following cards:

- Total Revenue (Year):** ₱81,790.00 (total revenue this year)
- Total Revenue:** ₱81,790.00 (in selected range)
- Net Income:** ₱39,790.00 (Revenue - Expenses)
- Today's Sales:** ₱76,290.00 (total paid today)
- Items Sold:** +8 (in selected range)
- Expenses:** ₱42,000.00 (in selected range)
- Inventory Value:** ₱5,181,290.00 (current stock value)
- Outstanding Balances:** ₱240.00 (across all transactions)
- Appointments:** 2 (in selected range)
- New Patients:** +1 (registered in selected range)

Below the summary cards, there is a 'Sales Overview' section with a bar chart showing monthly sales, revenue, and expense trends. To the right, there is an 'Upcoming Pickups' section with filters for 'Today (1)' and 'This Week (1)', listing 'John Dela Cruz' and a 'View TXN' link. A '9.' icon is visible in the bottom right corner.

04 Filter Data by This Week

You can also see pickup schedules in the dashboard.

The screenshot displays the Cliniqua360 dashboard for the 'Main Branch' on 'Apr 01, 2026 - Apr 30, 2026'. The dashboard is divided into several sections:

- General Metrics:** Total Revenue (Year) at ₱81,790.00, Total Revenue at ₱81,790.00, Net Income at ₱39,790.00, Today's Sales at ₱76,290.00, and Items Sold at +8.
- Expenses and Inventory:** Expenses at ₱42,000.00 and Inventory Value at ₱5,181,290.00.
- Sales Overview:** A bar chart showing monthly sales, revenue, and expense trends.
- Upcoming Pickups:** A section titled 'Upcoming Pickups' with a filter dropdown set to 'This Week (1)'. A pickup is listed for 'John Dela Cruz' on 'Tuesday, Apr 07'.

A large black box with the text 'Click This Week' and a yellow arrow points to the 'This Week (1)' filter in the 'Upcoming Pickups' section.

05 Filter Data by Today

Click "Today" to narrow down the items for pickup today.

The screenshot displays the Clinica360 dashboard for the 'Main Branch'. The dashboard includes a sidebar with navigation options like Dashboard, POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, and Task Board. The main content area features a 'Dashboard' section with various metrics: Total Revenue (Year) at ₱81,790.00, Total Revenue at ₱81,790.00, Net Income at ₱39,790.00, Today's Sales at ₱76,290.00, and Items Sold at +8. Below this is a 'Sales Overview' chart and an 'Upcoming Pickups' section. In the 'Upcoming Pickups' section, the 'Today (1)' filter is highlighted with a yellow box, and a yellow arrow points to it from a 'Click Today' text overlay.

Metric	Value
Total Revenue (Year)	₱81,790.00
Total Revenue	₱81,790.00
Net Income	₱39,790.00
Today's Sales	₱76,290.00
Items Sold	+8
Expenses	₱42,000.00
Inventory Value	₱5,181,990.00
Outstanding Balances	₱2,400,000.00
New Patients	+1

Upcoming Pickups

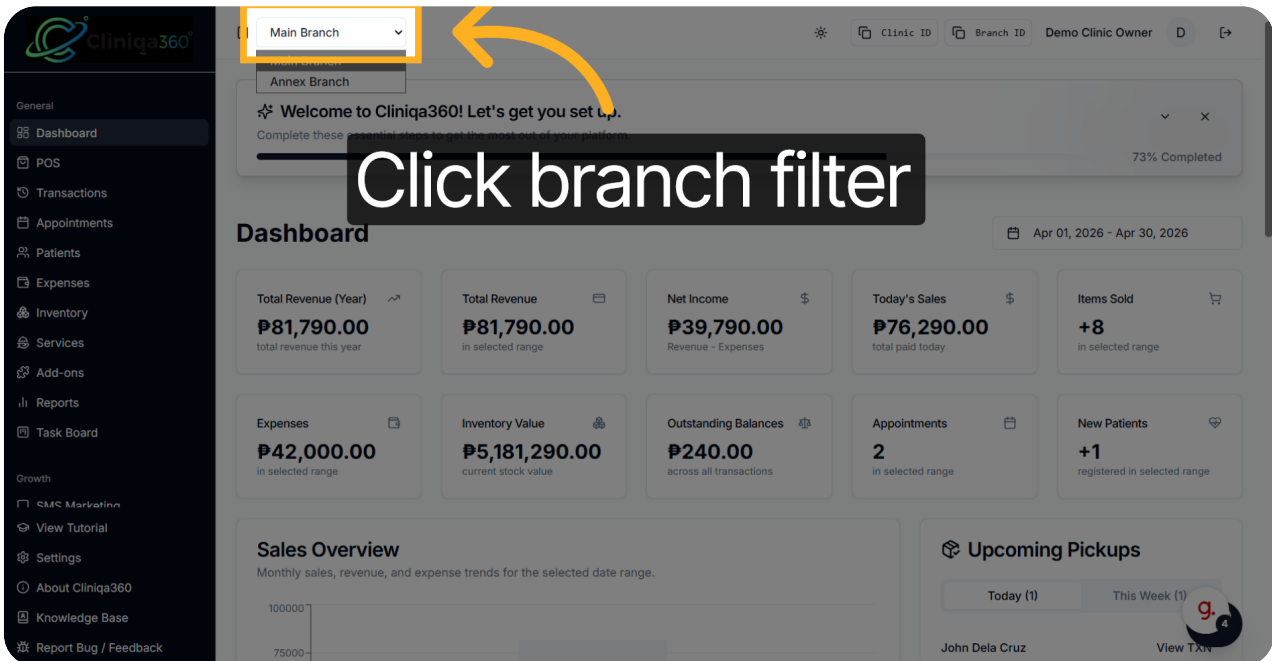
Filter	Count
Today	1
This Week	1

Upcoming Pickups List:

Name	Date	Action
John Dela Cruz	Tuesday, Apr 07	View TXN

06 Select Branch Filter

Click the branch filter to choose which clinic branch data to display.



The screenshot displays the Cliniqua360 dashboard interface. At the top left, the Cliniqua360 logo is visible. A dropdown menu for branch selection is located at the top center, with 'Main Branch' selected and highlighted by a yellow box. An orange arrow points to this dropdown. Below the dropdown, a dark grey box with white text reads 'Click branch filter'. The dashboard content includes a navigation sidebar on the left, a top navigation bar with 'Clinic ID', 'Branch ID', and 'Demo Clinic Owner', and a main content area with various metrics and charts. The metrics section shows:

Metric	Value	Subtext
Total Revenue (Year)	₱81,790.00	total revenue this year
Total Revenue	₱81,790.00	in selected range
Net Income	₱39,790.00	Revenue - Expenses
Today's Sales	₱76,290.00	total paid today
Items Sold	+8	in selected range
Expenses	₱42,000.00	in selected range
Inventory Value	₱5,181,290.00	current stock value
Outstanding Balances	₱240.00	across all transactions
Appointments	2	in selected range
New Patients	+1	registered in selected range

The 'Sales Overview' section shows a line chart for monthly sales, revenue, and expense trends. The 'Upcoming Pickups' section lists 'John Dela Cruz' for 'Today (1)' and 'This Week (1)'. A user profile icon for 'g.' is visible in the bottom right corner.

07 Enter Branch Name

Fill in the branch name field to specify the branch you want to view or manage.

The screenshot displays the Cliniqua360 dashboard interface. At the top, there is a navigation bar with the Cliniqua360 logo on the left and user information (Main Branch, Clinic ID, Branch ID, Demo Clinic Owner) on the right. Below the navigation bar, a welcome message reads "Welcome to Cliniqua360! Let's get you set up." with a progress bar indicating 73% completion. The main dashboard area is titled "Dashboard" and shows a date range of "Apr 01, 2026 - Apr 30, 2026". It features several key performance indicators (KPIs) in a grid format:

- Total Revenue (Year):** ₱81,790.00 (total revenue this year)
- Total Revenue:** ₱81,790.00 (in selected range)
- Net Income:** ₱39,790.00 (Revenue - Expenses)
- Today's Sales:** ₱76,290.00 (total paid today)
- Items Sold:** +8 (in selected range)
- Expenses:** ₱42,000.00 (in selected range)
- Inventory Value:** ₱5,181,290.00 (current stock value)
- Outstanding Balances:** ₱240.00 (across all transactions)
- Appointments:** 2 (in selected range)
- New Patients:** +1 (registered in selected range)

Below the KPIs, there are two sections: "Sales Overview" and "Upcoming Pickups". The "Sales Overview" section shows a line chart for "Monthly sales, revenue, and expense trends for the selected date range." with a y-axis ranging from 75,000 to 100,000. The "Upcoming Pickups" section shows a list of pickups for "Today (1)" and "This Week (1)", with one pickup listed for "John Dela Cruz" and a "View TXN" link.

08 Confirm Branch Selection

Click the branch name again to confirm your selection and update the displayed data accordingly.

The screenshot shows the Cliniqua360 dashboard interface. At the top left, the Cliniqua360 logo is visible. Below it is a sidebar menu with categories: General (Dashboard, POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, Task Board), Growth (CMS Marketing, View Tutorial, Settings, About Cliniqua360, Knowledge Base, Report Bug / Feedback), and a user profile section (Clinic ID, Branch ID, Demo Clinic Owner, D). The main content area shows a welcome message, a progress indicator (73% Completed), and a dashboard with various metrics:

Metric	Value	Subtext
Total Revenue (Year)	₱1,310.40	total revenue this year
Total Revenue	₱1,310.40	in selected range
Net Income	₱1,310.40	Revenue - Expenses
Today's Sales	₱0.00	total paid today
Items Sold	+2	in selected range
Expenses	₱0.00	in selected range
Inventory Value	₱59,600.00	current stock value
Outstanding Balances	₱0.00	across all transactions
Appointments	1	in selected range
New Patients	+1	registered in selected range

Below the dashboard is a 'Sales Overview' section with a line chart and an 'Upcoming Pickups' section with buttons for 'Today (0)' and 'This Week (0)'. A yellow arrow points to the 'Annex Branch' dropdown menu, and a black box with white text says 'Click branch name'.

09 Update Branch Information

Fill the branch name field again to make any necessary changes to the branch information.

The screenshot displays the Cliniqua360 dashboard interface. On the left is a dark sidebar menu with categories like 'General', 'Growth', and 'Reports'. The top navigation bar shows the current branch as 'Annex Branch' and includes fields for 'Clinic ID', 'Branch ID', and 'Demo Clinic Owner'. A welcome banner at the top right indicates that 73% of essential setup steps are completed. The main dashboard area features a grid of KPI cards for Total Revenue (Year and Selected Range), Net Income, Today's Sales, Items Sold, Expenses, Inventory Value, Outstanding Balances, Appointments, and New Patients. Below the KPI cards is a 'Sales Overview' section with a line chart showing trends for the selected date range. To the right of the chart is an 'Upcoming Pickups' section with tabs for 'Today (0)' and 'This Week (0)', and a notification badge showing '9'.

Metric	Value	Subtext
Total Revenue (Year)	₱1,310.40	total revenue this year
Total Revenue	₱1,310.40	in selected range
Net Income	₱1,310.40	Revenue - Expenses
Today's Sales	₱0.00	total paid today
Items Sold	+2	in selected range
Expenses	₱0.00	in selected range
Inventory Value	₱59,600.00	current stock value
Outstanding Balances	₱0.00	across all transactions
Appointments	1	in selected range
New Patients	+1	registered in selected range

10 Switch to Dark Mode

Click "Dark" to enable dark mode for the Cliniqa360 interface, enhancing visual comfort.

The screenshot shows the Cliniqa360 dashboard interface. A yellow arrow points to a 'Dark' button in the top right corner, which is highlighted with a yellow box. A large black callout box with the text 'Click Dark' is overlaid on the dashboard. The dashboard displays various financial and operational metrics for the selected date range (Apr 01, 2026 - Apr 30, 2026).

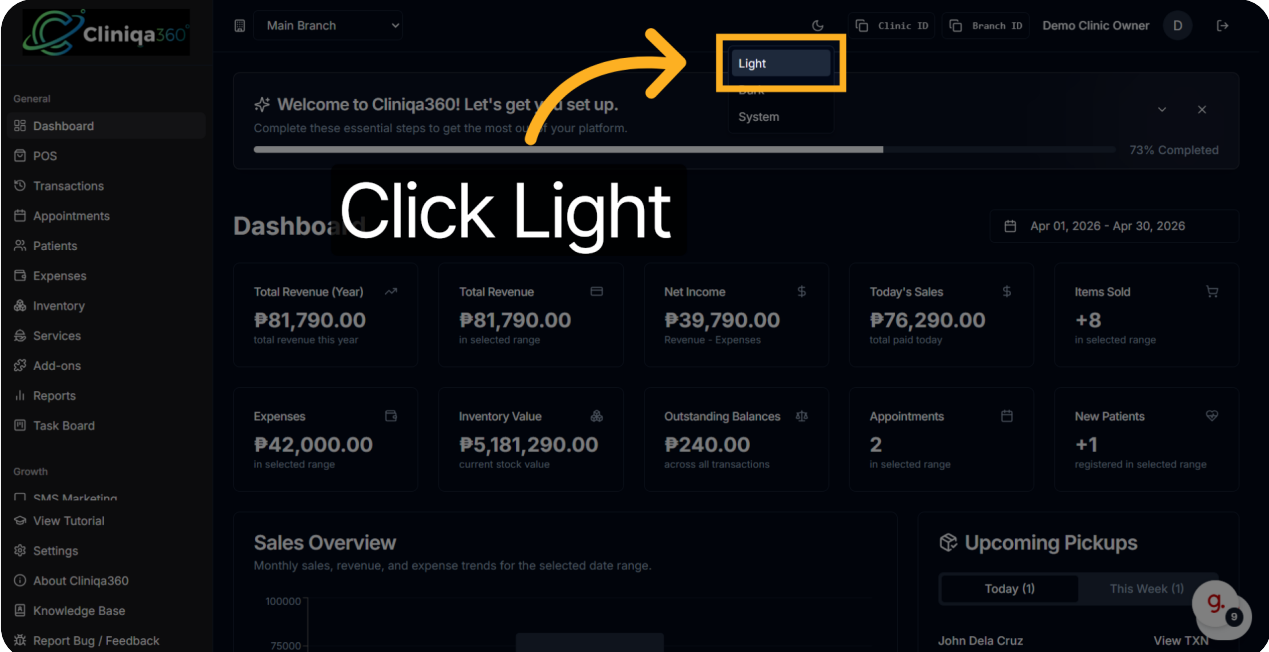
Metric	Value	Subtext
Total Revenue (Year)	₱81,790.00	total revenue this year
Total Revenue	₱81,790.00	in selected range
Net Income	₱39,790.00	Revenue - Expenses
Today's Sales	₱76,290.00	total paid today
Items Sold	+8	in selected range
Expenses	₱42,000.00	in selected range
Inventory Value	₱5,181,290.00	current stock value
Outstanding Balances	₱240.00	across all transactions
Appointments	2	in selected range
New Patients	+1	registered in selected range

Sales Overview
Monthly sales, revenue, and expense trends for the selected date range.

Upcoming Pickups
Today (1) This Week (1)
John Dela Cruz View TXN

11 Switch to Light Mode

Click "Light" to revert the interface back to light mode for standard display settings.



The screenshot shows the Clinika360 dashboard in dark mode. A yellow arrow points to a 'Light' theme toggle button in the top right corner, which is highlighted with a yellow box. The dashboard includes a sidebar with navigation options, a main content area with various data cards, and a 'Sales Overview' chart.

Click Light

Category	Value	Subtext
Total Revenue (Year)	₱81,790.00	total revenue this year
Total Revenue	₱81,790.00	in selected range
Net Income	₱39,790.00	Revenue - Expenses
Today's Sales	₱76,290.00	total paid today
Items Sold	+8	in selected range
Expenses	₱42,000.00	in selected range
Inventory Value	₱5,181,290.00	current stock value
Outstanding Balances	₱240.00	across all transactions
Appointments	2	in selected range
New Patients	+1	registered in selected range

Sales Overview
Monthly sales, revenue, and expense trends for the selected date range.

Upcoming Pickups
Today (1) This Week (1)
John Dela Cruz View TXN

12 Sort by Clinic ID

Click "Clinic ID" to copy the unique clinic identification numbers that you can give to the patient to login via patient portal

The screenshot shows the Cliniqua360 dashboard interface. In the top right corner, there is a navigation bar with several buttons: 'Main Branch', 'Clinic ID', 'Branch ID', 'Demo Clinic Owner', and 'D'. A yellow arrow points from a large black callout box with the text 'Click Clinic ID' to the 'Clinic ID' button. The dashboard itself displays various financial and operational metrics for the period of Apr 01, 2026 - Apr 30, 2026.

Metric	Value	Subtext
Total Revenue (Year)	₱81,790.00	total revenue this year
Total Revenue	₱81,790.00	in selected range
Net Income	₱39,790.00	Revenue - Expenses
Today's Sales	₱76,290.00	total paid today
Items Sold	+8	in selected range
Expenses	₱42,000.00	in selected range
Inventory Value	₱5,181,290.00	current stock value
Outstanding Balances	₱240.00	across all transactions
Appointments	2	in selected range
New Patients	+1	registered in selected range

Sales Overview
Monthly sales, revenue, and expense trends for the selected date range.

Upcoming Pickups
Today (1) This Week (1)
John Dela Cruz View TXN

13 Sort by Branch ID

Click "Branch ID" to copy the branch identification ID that you can give to the patient to log in via the patient portal

The screenshot shows the Cliniqua360 dashboard interface. In the top right corner, there is a button labeled "Branch ID" which is highlighted with a yellow box. A yellow arrow points from the text "Click Branch ID" (which is overlaid in a large black box with white text) to this button. The dashboard itself displays various financial and operational metrics for a selected date range (Apr 01, 2026 - Apr 30, 2026). A notification in the bottom right corner indicates "Clinic ID copied clinic_xE9XWI7B".

Metric	Value	Subtext
Total Revenue (Year)	₱81,790.00	total revenue this year
Total Revenue	₱81,790.00	in selected range
Net Income	₱39,790.00	Revenue - Expenses
Today's Sales	₱76,290.00	total paid today
Items Sold	+8	in selected range
Expenses	₱42,000.00	in selected range
Inventory Value	₱5,181,290.00	current stock value
Outstanding Balances	₱240.00	across all transactions
Appointments	2	in selected range
New Patients	+1	registered in selected range

You have successfully navigated the Cliniq360 platform to view detailed revenue reports and manage branch display settings. This enables efficient monitoring of clinic financials and customization of branch data views for better operational insights.

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