All Staff Training Checklist

Print the All Staff Training checklist and use it to mark the tutorials you have viewed and completed.

The total duration of the video tutorials for each section is shown in minutes to assist you with planning the training with your daily activities.

- ☐ Installation
- ☐ Logging In

☐ Touring the Workspace

- ☐ Top Menu
- ☐ Client Header
- ☐ Main Menu
- ☐ Appointment Book
- ☐ Getting Help

☐ Appointment Booking (6:00 mins)

- ☐ Create an Appointment
- ☐ Create Follow Up Appointments
- ☐ Appointment Status
- ☐ Appointment Reminders
- ☐ Appointment Charges
- ☐ Add a Client to a Class

☐ Managing Clients (5:00 mins)

- ☐ Create a New Client
- ☐ Search for an Existing Client
- ☐ Simple Client Payment
- ☐ Client Letters
- ☐ Client Events

All Staff Training Checklist

☐ Managing Conditions (7:00 mins)

- ☐ Create a Private Client Condition
- ☐ Create an Insured Client Condition
- ☐ Create a Condition for a New ACC Claim

☐ Reporting (2:00 mins)

- ☐ Run a Report

☐ Hints and Tips (5:00 mins)

- ☐ Appointment Book Display Options
- ☐ GPM Icons and Their Meanings
- ☐ GPM Shortcut Keys
- ☐ Export Data to Excel
- ☐ Save Reports to other file formats
- ☐ Create a To-Do Event