GENSOLVE SUPPORT CENTRE

GPM Start-Up Training Checklist

Print the GPM Start-Up Training checklist and use it to mark the tutorials you have viewed and completed. Once you have completed the training, print your name and sign the page.

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

☐ Workspace (04:30)

- ☐ Welcome to your GPM Workspace

☐ Administration (06:02)

- ☐ Creating New Clients
- ☐ Searching your Database
- ☐ Using Letter Templates in GPM
- ☐ Scheduling your Client SMS Reminders
- ☐ Creating Events (ToDos) Related to Clients

☐ Appointments (24:50)

- ☐ Creating Appointments
- ☐ Creating Breaks in your Diary (Clinician Appointments)
- ☐ How to Create a Quick Space Saving Appointment
- ☐ How to Edit an Appointment and Add Charges
- ☐ Working with Conditions and Medical Notes

☐ HICAPS/Payments (15:51)

- ☐ Using HICAPS with GPM
- ☐ Client Payments

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☐ **Debtors/Invoicing (03:31)**

☐ Creating your Debtor Database

☐ How to Create a Client Invoice

☐ How to Create a Debtor Invoice

☐ How to Find a Debtor Invoice in your System

☐ **Payments (05:52)**

☐ Working with Client Payments

☐ Processing Debtor Payments

☐ **Daily Takings/Banking (02:29)**

☐ How to Create Daily Takings

☐ How to Create a Banking

☐ **Accounting Form (11:19)**

☐ Accounting Tasks

☐ End of Year Financial Tasks

☐ **Reports (07:45)**

☐ Built In Reports

☐ **Support Centre (04:51)**

☐ Using the Support Centre and Getting More Help

Print Name   _____

Signature _____   Date ___/____/____