All Staff Training Checklist

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

You can pause the videos at any point, as well as drag the curser for the video backwards to review the video or drag it forwards to view a specific point in the video.

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

- ☐ Installing Gensolve Practice Manager.
- ☐ Logging In to Gensolve Practice Manager.

☐ Touring the Workspace

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

☐ Appointment Booking (4:00 mins)

- ☐ How to Create an Appointment.
- ☐ How to Create a Follow Up Appointment.
- ☐ How to Set an Appointment Status.
- ☐ How to Send a Client an SMS Message.
- ☐ How to Edit an Appointment and Add Charges.
- ☐ How to Add a Client to a Class.

☐ Managing Clients (4:00 mins)

- ☐ How to Create a New Client.
- ☐ How to Search for an Existing Client.

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- ☐ How to Create a Simple Client Payment.
- ☐ How to Create a Letter Template.
- ☐ How to Create a Client Event.

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☐ Managing Conditions (4:30 mins)

- ☐ How to Create a Private Client Condition.
- ☐ How to Create an Insured Client Condition.

☐ Reporting (1:30 mins)

- ☐ How to Run a Report

☐ Hints and Tips (4:00 mins)

- ☐ An Overview of the Appointment Book Display Options.
- ☐ Icons.
- ☐ Shortcut Keys.
- ☐ How to Export Data to Excel.
- ☐ How to Save a Report in a PDF format.
- ☐ How to Create an Event in the To Do List.