



Appointments Training

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Company: _____ Signed: _____

Name: _____ Position: _____ Date: _____

Trainee to complete: Please tick

1. [] **Creating Appointments**
Can you create a New Appointment from the Main Calendar?
2. [] **Reps**
How do you display employees on the calender?
3. [] **Creating Reps**
How do you create a Rep?
4. [] **Charging Rates**
Can you set-up service charges?
5. [] **New Appointment**
Can you create a New Appointment from the Main Calendar?
6. [] **Selecting Services**
Can you add a charge to the appointment?
7. [] **Time Increments**
How do you change the times displayed on the main calender screen?
8. [] **Customise Screen**
How do you change who is displayed on the main calender screen?
9. [] **Week and Month**
Can you change the view to display week or Month?
10. [] **Roster Link**
Why would you use the employee roster to allocate your availability?
11. [] **Creating Services**
Can you add a service charge?
12. [] **Itinerary**
Has printing an itinerary and appointments been explained in Print Appointments?
13. [] **Leads Link**
Can you create a New Appointment from the Leads screen?
14. [] **Workshop Link**
Can you create a New Appointment from the Repairs screen?
15. [] **Timesheet Feed**

Can you load times from an appointment to a Repairs?

- 16.[] **Auto Load Hours**
What preference do you need to auto load actual times to an appointment?
- 17.[] **Itinerary Equipment**
Where can you see what equipment has been worked on?
- 18.[] **Support Logs**
How to Add a Customer to the Support List?
- 19.[] **Open Log via Date**
When you drill down on the date which form opens?
- 20.[] **Open Customer**
When you drill down on the customer name which form opens?
- 21.[] **Show in Log**
Where can you configure a Customer to be available in the Support List?
- 22.[] **Logmein Link**
Can you load logmenin directly from the support log?
- 23.[] **Public Holidays**
Where can you configure what public holidays are coming?

Notes:

Are there any aspects in this area that more training would be useful?
