

## Users Documentation : Working Video Tutorial List



This page last changed on Jul 09, 2007 by [mcosta](#).









**This is page contains a list of video tutorials currently being worked on by the Implementor Community.**

Basic Training Modules				
Document	Versions	Completed	On Site	Contributor/Assigned To
1. Add a new customer (Customer)	V1			Clancy Wilson
2. Add a new patient for an existing customer (Customer/Patient)	V1			Clancy Wilson
<b>3. Making Appointments</b>				
3.1 Making an Appointment (Workflow)				
3.2 Making an Appointment for a new Customer (Workflow/Customer/Patient)				
<b>4. The Consulting Workflow</b>				
4.1 Checking in a Patient (Workflow)				
4.2 Performing a Consult + Invoice (Workflow/Patient/Customer)				
4.3 Performing a Checkout + Taking Payment (Workflow/Customer)				
<b>5. Perform Daily Banking</b>				
5.1 Clearing a				

till ( <i>Financial</i> )				
5.2 Generating a deposit report ( <i>Financial</i> )				
6. Perform an Over The Counter sale (OTC) ( <i>Workflow</i> )	V1+ Verbose			Clancy Wilson
7. Reverse a billing error. ( <i>Customer</i> )				
7. Generate a refund. ( <i>Customer</i> )				
9. Working with Hyperlinks	V1+ Verbose			Clancy Wilson
10. Find an existing client or animal. ( <i>Customer/Patient</i> )				
11. Create an estimate for a client. ( <i>Customer</i> )				
12. Review an account based on client query. ( <i>Customer</i> )				
14. Communicate with other staff regarding customers or patients. ( <i>Workflow-&gt;Messaging</i> )				

### Advanced Training Modules

Document	Version	Completed	On Site	Contributor/Assigned To
1. The Reminders Workspace				
2. The Statements Workspace				
3. Generating Documents from Template				

4. Attaching Documents/Pictures				
<b>5. Products</b>				
5.1 Add a new Product ( <i>Products</i> )				
5.1 Create a template product ( <i>Products</i> )				
6. Setting up a Multi-location Practice				
7. Working with Worklists		