



Pulse Home Page Tabs

Quick Set up Guide



SETTING UP YOUR HOME PAGE ON PULSE

Depending on which module of Pulse you are using, you can set up what you want to see on your homepage as well as the individual Tabs. Once you have setup your Home Tab, you can set up the others under the Setup Tab.

The screenshot shows the 'Front Page' configuration page. At the top, a navigation bar contains several tabs: 'My Home' (highlighted in blue), 'Classic', 'Financial', 'Sales', 'Service', 'Projects', 'T-Sheets and E-Claims', and 'Setup'. Below this, the 'Front Page' title is visible. There are two buttons: 'Apply Changes' and 'Save'. Below the buttons, there are two tabs: 'My Home Tab' (selected) and 'General Tab(s)'. The main content is a table with the following columns: Tab, Box, Use, List Order, Height, and Refresh Interval (secs).

Tab	Box	Use	List Order	Height	Refresh Interval (secs)
Classic	Original Menu	<input type="checkbox"/>	0	475 px	0
Financial	Assigned Invoices	<input type="checkbox"/>	0	350 px	0
	Value of Top Quotations Sent	<input type="checkbox"/>	0	350 px	0
	Cash Payment Scoreboard	<input type="checkbox"/>	0	120 px	0
	Assigned Cash Payment	<input type="checkbox"/>	0	350 px	0
	Assigned Supplier Invoices	<input type="checkbox"/>	0	350 px	0
Sales	Assigned Supplier Recons	<input type="checkbox"/>	0	350 px	0
	Sales Shortcuts	<input type="checkbox"/>	0	40 px	0
	My Opportunities vs Targets	<input type="checkbox"/>	0	200 px	0
	Campaign Dashboard	<input type="checkbox"/>	0	600 px	0
	Your Open Opportunities	<input type="checkbox"/>	0	300 px	0
	Company Sales vs Targets	<input type="checkbox"/>	0	600 px	0
	Quotes Assigned to You	<input type="checkbox"/>	0	350 px	0
Your Opportunities	<input type="checkbox"/>	0	300 px	0	
	Tasks Assigned to You	<input type="checkbox"/>	0	300 px	0

Tick the relevant boxes you wish to see on your home page, click "Save" and then "Apply Changes".

Tab	Box	Use	List Order	Height	Refresh Interval (secs)
Classic	Original Menu	<input type="checkbox"/>	0	475 px	0
Financial	Assigned Invoices	<input type="checkbox"/>	0	350 px	0
	Value of Top Quotations Sent	<input type="checkbox"/>	0	350 px	0
	Cash Payment Scoreboard	<input type="checkbox"/>	0	120 px	0
	Assigned Cash Payment	<input type="checkbox"/>	0	350 px	0
Sales	Assigned Supplier Invoices	<input type="checkbox"/>	0	350 px	0
	Assigned Supplier Recons	<input type="checkbox"/>	0	350 px	0
	Sales Shortcuts	<input type="checkbox"/>	0	40 px	0
	My Opportunities vs Targets	<input type="checkbox"/>	0	200 px	0
	Campaign Dashboard	<input type="checkbox"/>	0	600 px	0
	Your Open Opportunities	<input type="checkbox"/>	0	300 px	0
	Company Sales vs Targets	<input type="checkbox"/>	0	600 px	0
	Quotes Assigned to You	<input type="checkbox"/>	0	350 px	0
Your Opportunities	<input type="checkbox"/>	0	300 px	0	
	Tasks Assigned to You	<input type="checkbox"/>	0	300 px	0

Remember to use the "collapse" function on your page views. This allows you to have a compact view of the headings you have set up.

- ▾ Sales Shortcuts
- ▾ Your Open Opportunities
- ▾ Your Opportunities
- ▾ Company Sales vs Targets
- ▾ Tasks Assigned to You
- ▾ Service Shortcuts

New Installation
 View current Installations
 View SLA status
 Current Outside Escalations