



Pulse Service

Administrative User Guide



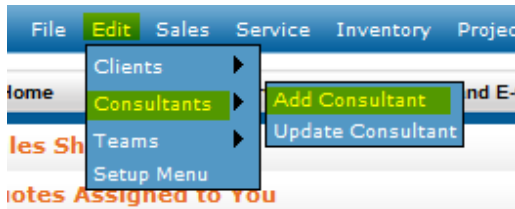
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1. ADDING A PULSE USER/TECNICIAN

This type of user would be a person who logs into Pulse to view or action work. This person has a user name and password.

Edit, Consultants – Add Consultant



Complete as shown below in the screenshot. Tick the tick boxes as specified, and choose the applicable clearance level using the various tabs under the consultant details:

The "Financials" section on adding a user apply only to engineers and technicians who do work for customers.

Press **SAVE**.

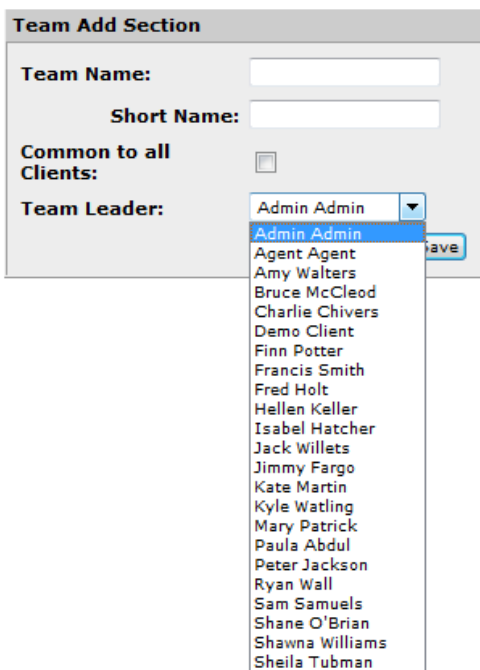
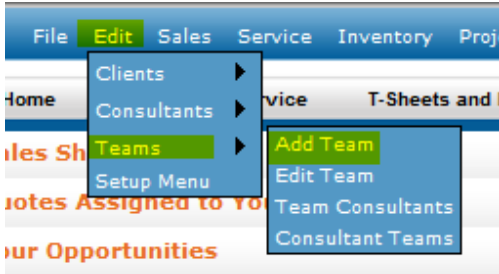
A screenshot of the 'Create new Consultant Details' form. The form contains several input fields: First Name, Surname, Initials, Mobile, Telephone, Fax, Email, SMS Email, Login Redirect, and Latitude & Longitude. There are also checkboxes for 'Hidden' and 'Hide Left Toolbar after Login', and a 'Physically At' field with a 'Clear' button. Below the form is a tabbed interface with tabs for 'Roles', 'Credentials', 'Service', 'Scoreboards', 'Financial', 'Rates', and 'Category/Custom Field'. The 'Roles' tab is highlighted with a red box, and a red arrow points to it. Under the 'Roles' tab, there are several checkboxes for functionality: Sales, Inventory, Financial, Booking, Service/Support, Contract, and Project. There is also a 'Role' dropdown menu set to '--Not Selected--', and two color selection fields for 'Colour for Project Tasks' and 'Colour for Bookings'. A 'Save' button is located in the top right corner of the form.

This user now needs to be added to a Team. See item 3 for further instructions.

2. ADDING AND MAINTAINING TEAMS

Adding a new Team:

Click Edit, Team – Add Team

A screenshot of a web form titled 'Team Add Section'. The form contains several fields: 'Team Name:' with a text input box, 'Short Name:' with a text input box, 'Common to all Clients:' with an unchecked checkbox, and 'Team Leader:' with a dropdown menu. The dropdown menu is open, displaying a list of names: Admin Admin, Agent Agent, Amy Walters, Bruce McCleod, Charlie Chivers, Demo Client, Finn Potter, Francis Smith, Fred Holt, Hellen Keller, Isabel Hatcher, Jack Willets, Jimmy Fargo, Kate Martin, Kyle Watling, Mary Patrick, Paula Abdul, Peter Jackson, Ryan Wall, Sam Samuels, Shane O'Brian, Shawna Williams, and Sheila Tubman. A 'Save' button is visible to the right of the dropdown menu.

Choose a name for the Team, tick the box, and select who the Team Leader is – this user or technician should already be added to Pulse.

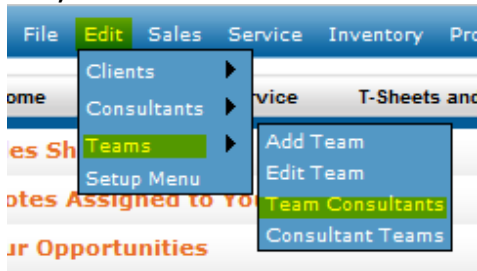
Click SAVE.

The team is now added.

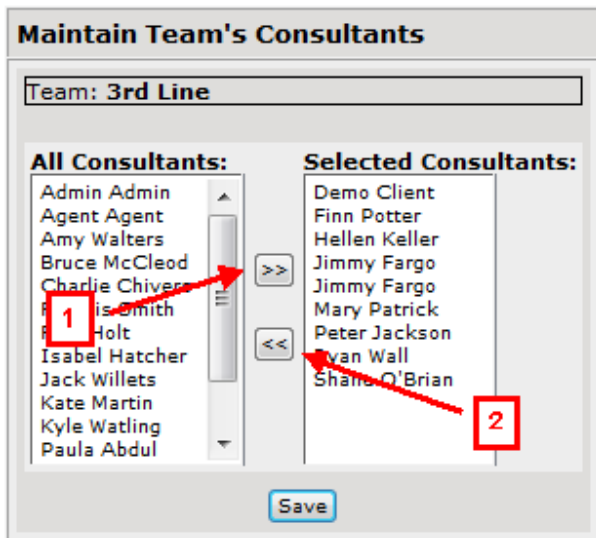
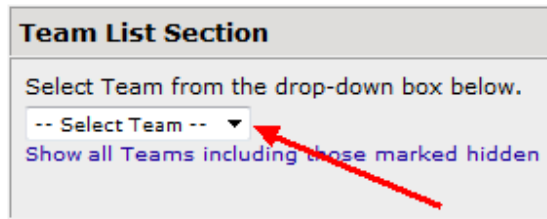
If the team already exists, and you want to add a new member to that team, see the next item.

3. ADDING THE USER OR TECHNICIAN TO A TEAM

Edit, Teams – Team Consultants



Select the team to which you want to add a member:



1. Select the user or technician from the "All Consultants" list and move him to the team by clicking on the >> button. This moves him into the "Selected Consultants" list which is the list of users or technicians in the selected team.
2. To remove a user or technician from a team, select the person from the "Selected Consultants" list and click the << button. This removes him from the team and puts him back in the "All Consultants" list.

Click **SAVE**.

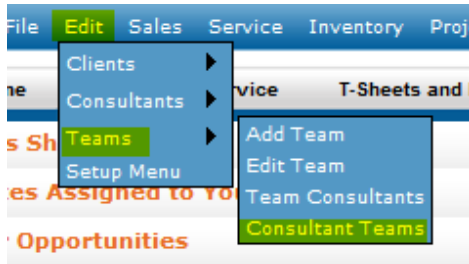
(As shown above)

4. ADDING THE USER OR TECHNICIAN TO MULTIPLE TEAMS

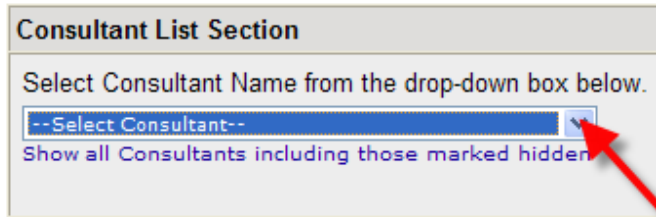
It may be that the user or technician may belong to more than one team. Perhaps he is a member of 1st Level Support as well as Johannesburg, for example.

To add this person to both teams, do the following:

Edit, Teams – Consultant Teams



Select the user or technician:

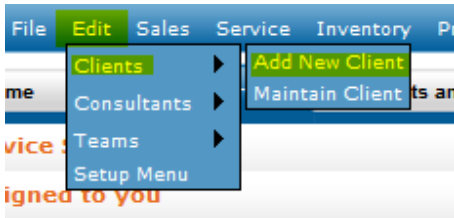


Select the team you wish to add the user or technician to from the "All Teams" list, and click the >> button to move to the "Selected Teams" list.

Click SAVE

5. ADDING A CUSTOMER

Edit, Client – Add New Client



Fill in all the necessary fields on the Client record – click SAVE.

NOTE THAT ANY FIELD WITH A RED ASTERIX NEXT TO THEM ARE MANDATORY

This caters for the basic client.

A screenshot of the 'Add Client Details' form. The form is divided into several sections. The top section contains fields for 'Client Name' (with a red asterisk), 'Account No', 'Telephone' (with a red asterisk), 'Contact Email', 'Website', 'Trading As', 'NameCode', 'Fax', 'Reply to Address', and 'VAT Reg Number'. Below these are checkboxes for 'Hidden' and 'Credit Hold'. The next section has 'Parent Client' and 'Alternate Contract' fields, each with a 'Clear' button. A tabbed interface follows, with 'Contact Info' selected. Below the tabs are fields for 'Physical Addr', 'Suburb', 'City/Town', 'Postal Code', 'Country' (with a dropdown menu), 'County' (with a dropdown menu), 'Latitude and Longitude', and 'Directions'. There is also a 'Postal Address' field and a 'Code' field. A 'Clear' button is located near the 'Latitude and Longitude' field. The form ends with a 'Save' button in the top right corner.

6. ADDING A CUSTOMER USER OR CONTACT PERSON

Click on "Client Details"

sample client 1000 (SC 1000) Client Details Sales Service Inventory Customer Financials Bookings

Update Client Details Save

Client Name sample client 1000 * Trading As sample client 1000

Account No SC 1000 NameCode

Click on "Contact Person" and then "Add Contact Person"

sample client 1000 (SC 1000) Update Contact Person

Update Contact Persons

Contact Person Details Add Contact Person

Name	Service Requests	Username Password	Company-Wide
ContactPersonFirstname1160 ContactPersonSurname1160	Logged Open Closed		No

Edit Cycles Move

Fill in the required details and click SAVE

Update Contact Person Save

* = Required

Title -Select-

FirstName * Surname

ID Number Birth Date

Telephone * Mobile Number

Email *

Login Redirect

Client sample client 1000

Role -Select-

Position

UserId Password

Hidden Company-wide rights

Group-wide rights Use as default for Incidents

Main Sales Contact Person Don't send Campaigns

Message to display in Client area.

Message From

Message To

Notes

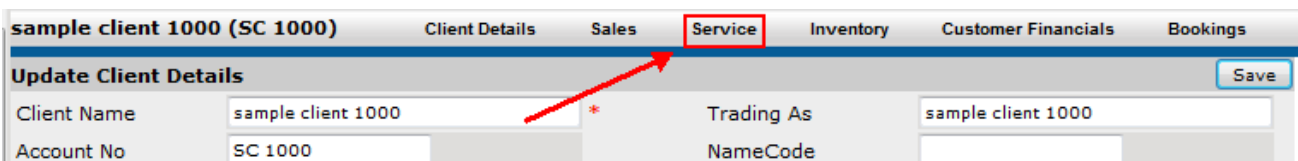
7. ADDING A CUSTOMER CONTRACT

Some customers will have contracts eg: Ellerines etc. These customers will have a "Head Office" site where their contract will be loaded. The contract is NOT loaded on each site. This is considered the "Parent" site or intermediary.

When a new site is loaded for these types of customers (with Parent), the parent site must be chosen on the customer record as shown below. This links up the Parent with the site, and the contract that is loaded on the Head Office site will also appear on the new site when logging a call.

For a new contract to be loaded on a customer, see the following steps:

Click on "Service"



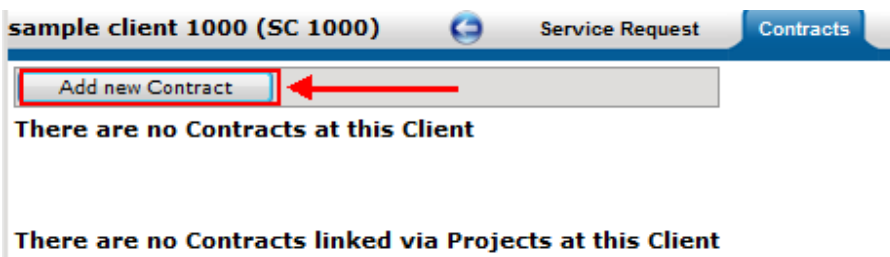
The screenshot shows the 'Service' tab selected in the client details page for 'sample client 1000 (SC 1000)'. The 'Service' tab is highlighted with a red box and a red arrow. The 'Update Client Details' form is visible, with fields for Client Name, Account No, Trading As, and NameCode. The Client Name field contains 'sample client 1000' and has an asterisk next to it. The Trading As field contains 'sample client 1000'. A 'Save' button is located in the top right corner of the form.

Click on "Contracts"



The screenshot shows the 'Contracts' tab selected in the client details page for 'sample client 1000 (SC 1000)'. The 'Contracts' tab is highlighted with a red box and a red arrow. The page displays a table with columns: FireBar, Ref No, Reporting Date, Description, Assigned, Status, Customer Invoice, and Supplier Invoice. The table is currently empty. There are also links for 'Open Service Request Listing', 'Log New Service Request', 'Show All Service Requests', and 'Show All Pages'.

Click "Add New Contract"



The screenshot shows the 'Add new Contract' button highlighted with a red box and a red arrow. The button is located in the 'Contracts' tab of the client details page for 'sample client 1000 (SC 1000)'. Below the button, the text reads: 'There are no Contracts at this Client' and 'There are no Contracts linked via Projects at this Client'.

Fill in the required fields

ADD Contract Save

Name

Contract Name Contract Number

Parent Contract No Parent Contract Type

Contract Username Contract Status

Assigned to Team

Template

Dates

Start Date * End Date *

Periods Period Remaining

Activation Date

Activation

Service Active

Service activation notes

Renew Contract

Financial Partner System Cancellation Warranty Service Project Custom Fields

Contract Currency *

Inclusive Monthly Amount (incl VAT) Monthly Invoice Day

Access Charge Annual Renewal Fee

Activation Fee

Income Catalogue Item

Payment Request Method

Any additional notes regarding the contract

Press SAVE.

