Pulse Service

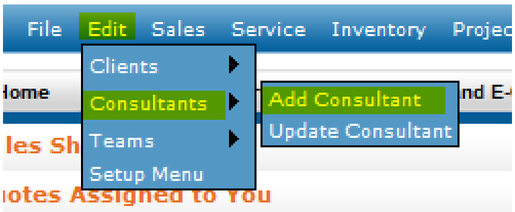
Administrative User Guide

CONTENTS

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.

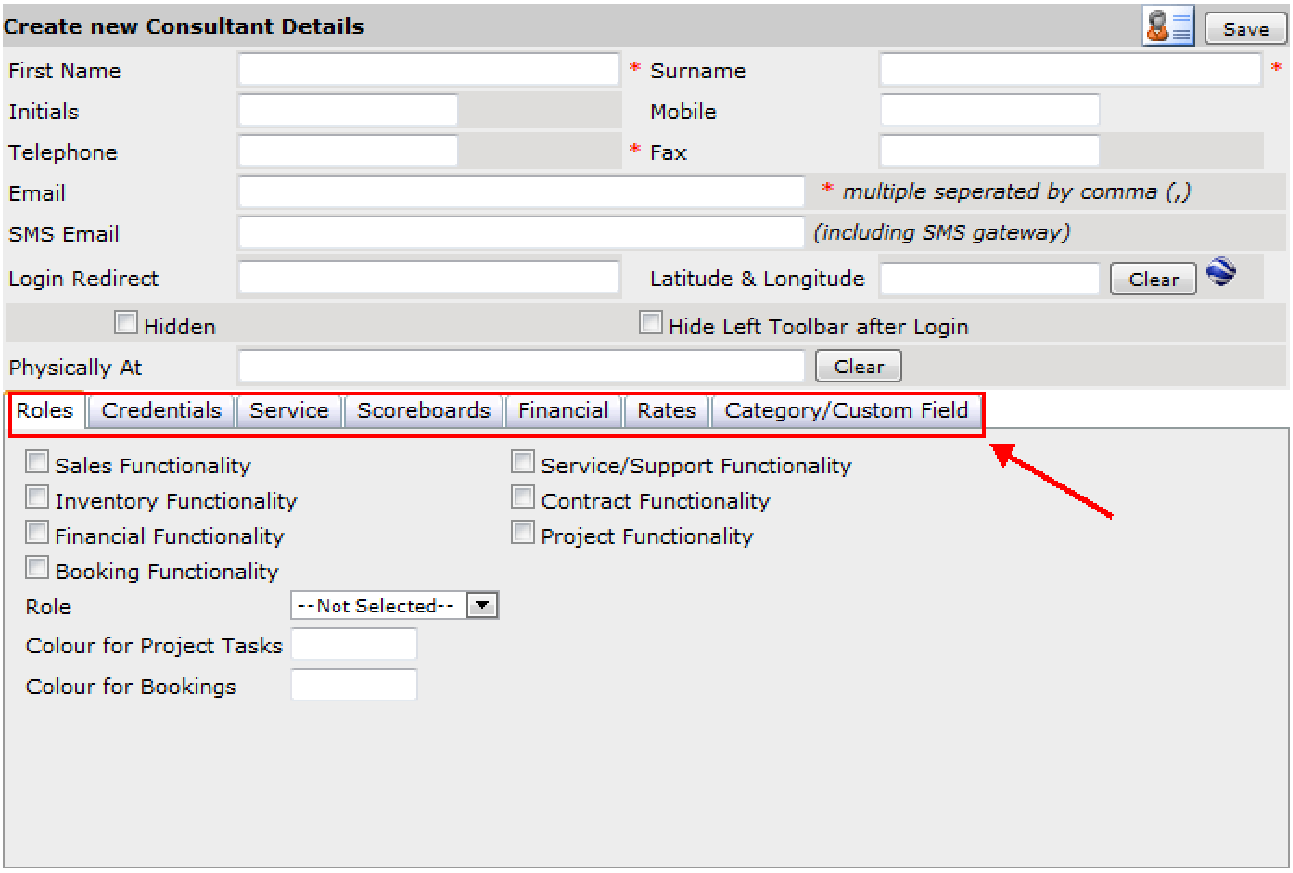
Edit, Consultants – Add Consultant



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.

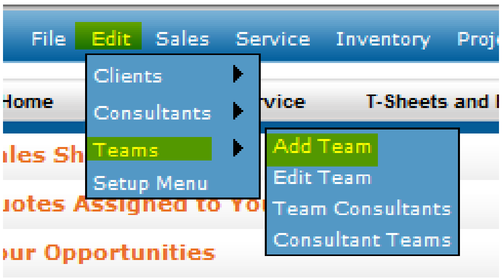


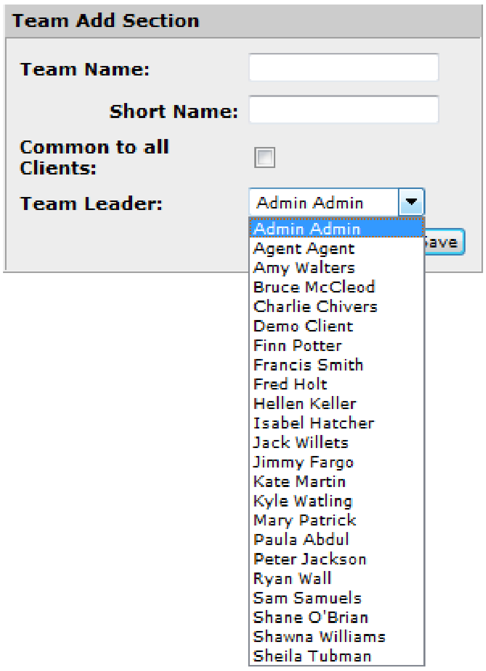
This user now needs to be added to a Team. See item 3 for further instructions.

2. ADDING AND MAINTAINING TEAMS

Adding a new Team:

Click Edit, Team – Add Team





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.

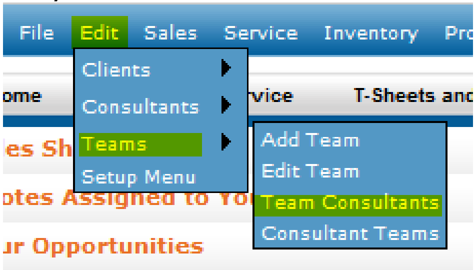
Click SAVE.

The team is now added.

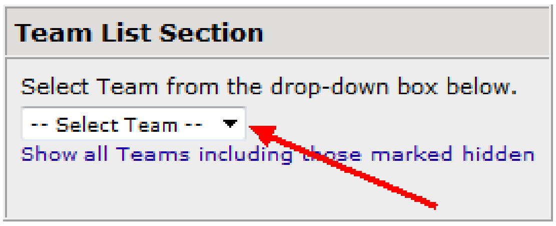
If the team already exists, and you want to add a new member to that team, see the next item.

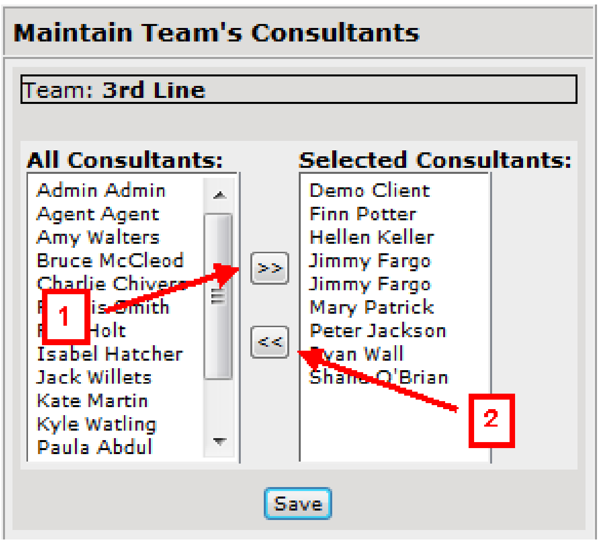
3. ADDING THE USER OR TECHNICIAN TO A TEAM

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.

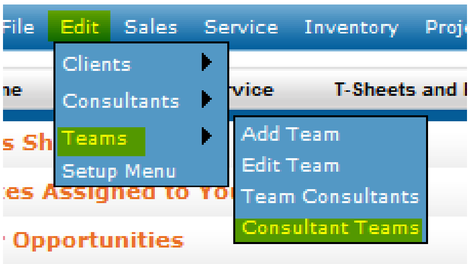
(As shown above)

4. ADDING THE USER OR TECHNICIAN TO MULTIPLE TEAMS

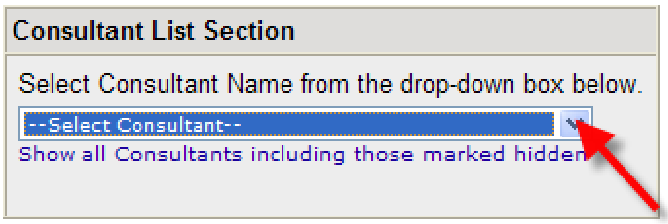
It may be that the user or technician may below to more than one team. Perhaps he is a member of 1st Level Support as well as Johannesburg, for example.

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

Edit, Teams – Consultant Teams



Select the user or technician:

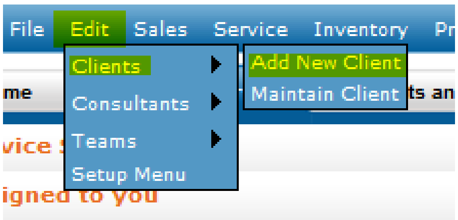


Select the team you wish to add the user or technician to from the "All Teams" list, and click the >> button to move to the "Selected Teams" list.

Click SAVE

.

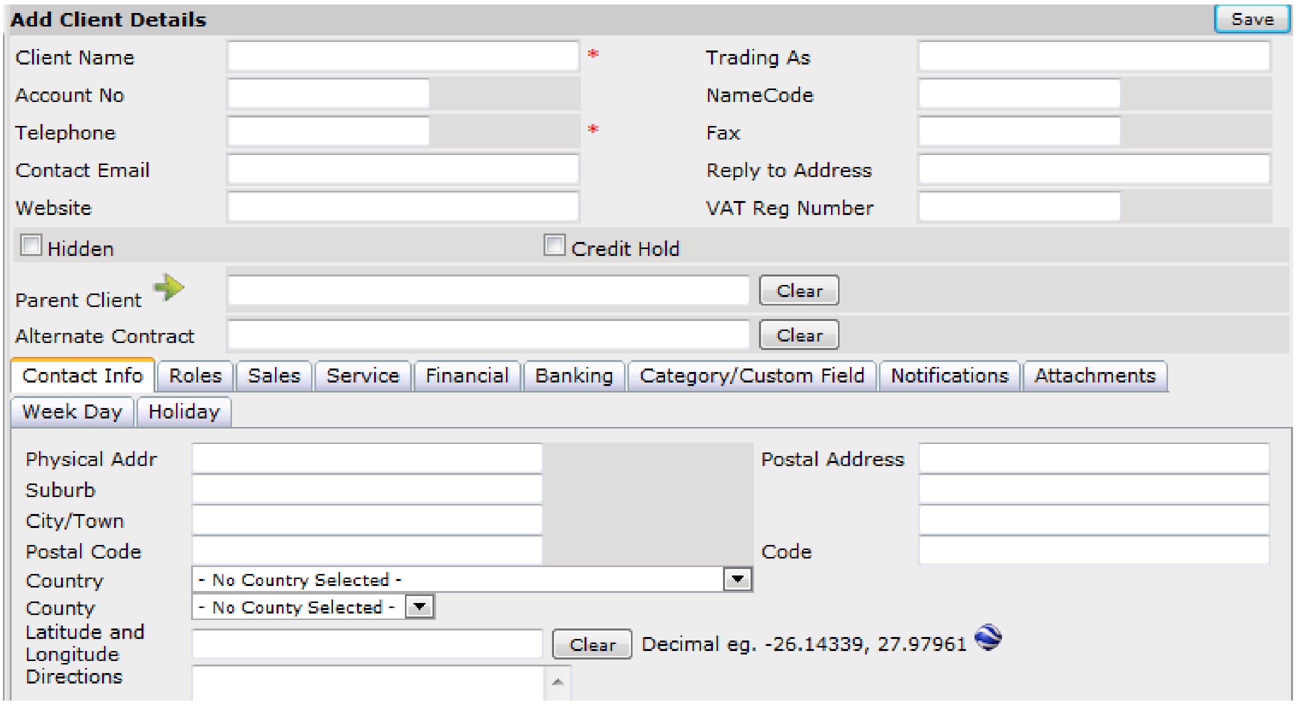
Edit, Client – Add New Client



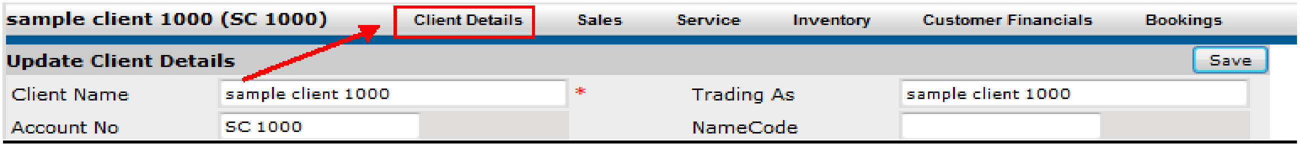
Fill in all the necessary fields on the Client record – click SAVE.

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

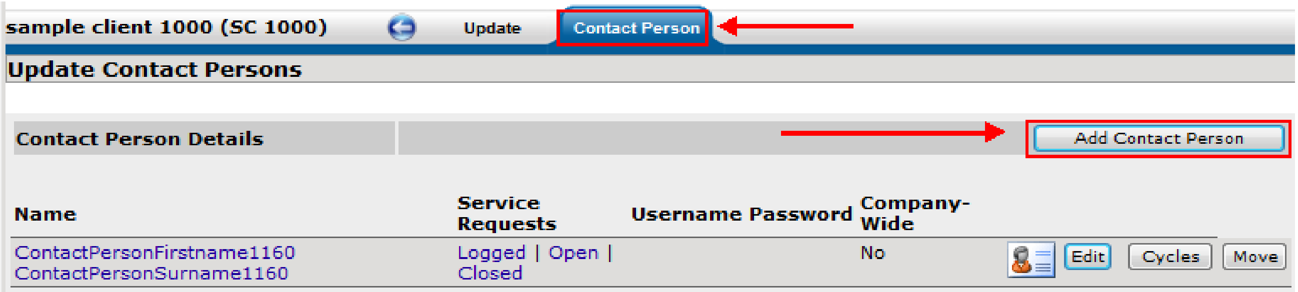
This caters for the basic client.



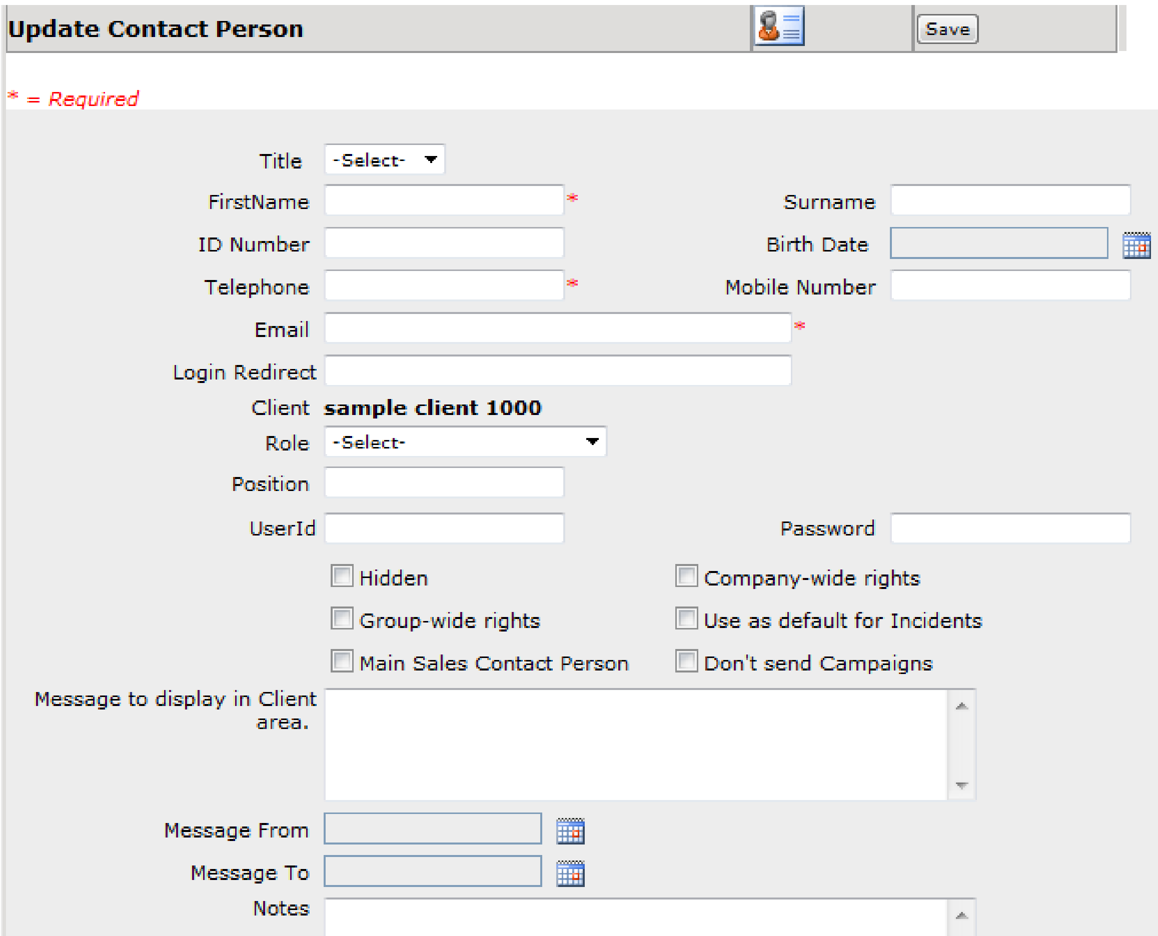
Click on "Client Details"



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



Fill in the required details and click SAVE



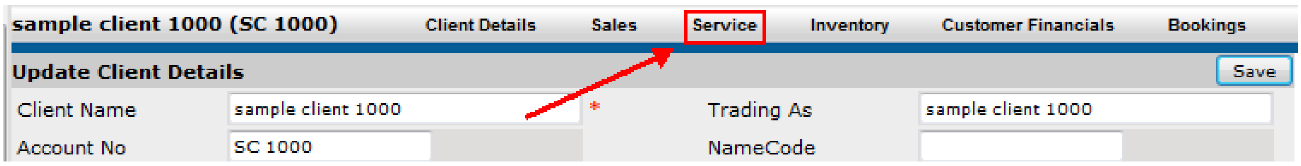
7. ADDING A CUSTOMER CONTRACT

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.

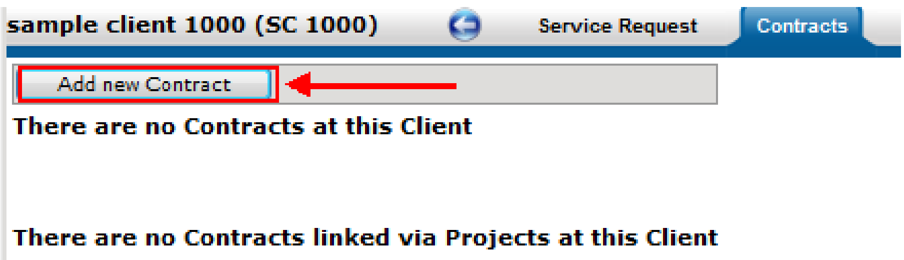
For a new contract to be loaded on a customer, see the following steps:

Click on "Service"

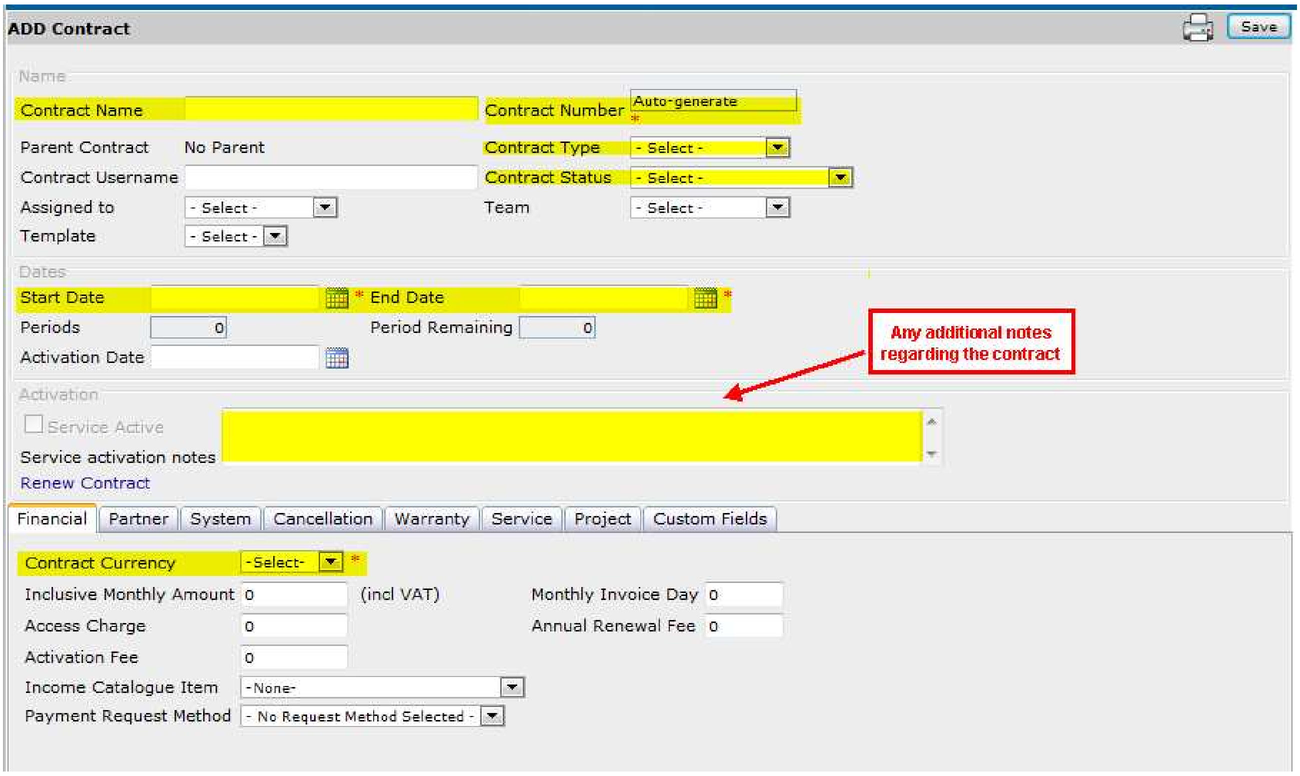


Click on "Contracts"

Click "Add New Contract"



Fill in the required fields



Press SAVE.