



# User Guide

For

# Pulse Service



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## Introduction

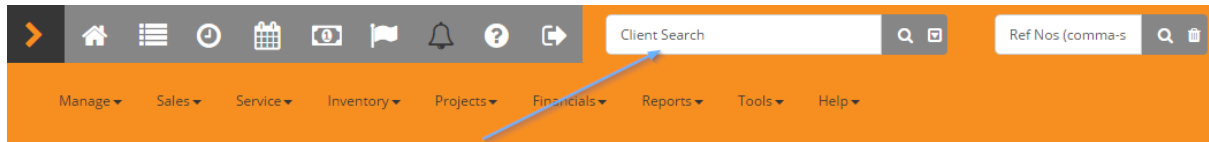
This document is intended as a user guide for users of the Pulse Service module. Screenshots are given with the text so that the user has an idea of what to look for. These screens may differ slightly in different versions of Pulse which is a constantly evolving product.

As a registered Pulse user, you can also receive one-to-one help by contacting Pulse Business Software Limited. See <http://www.pulse-software.co.uk/deployment/support/> for contact details.

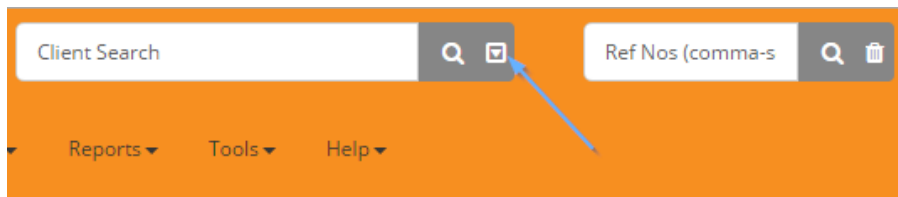


## Looking up an existing site

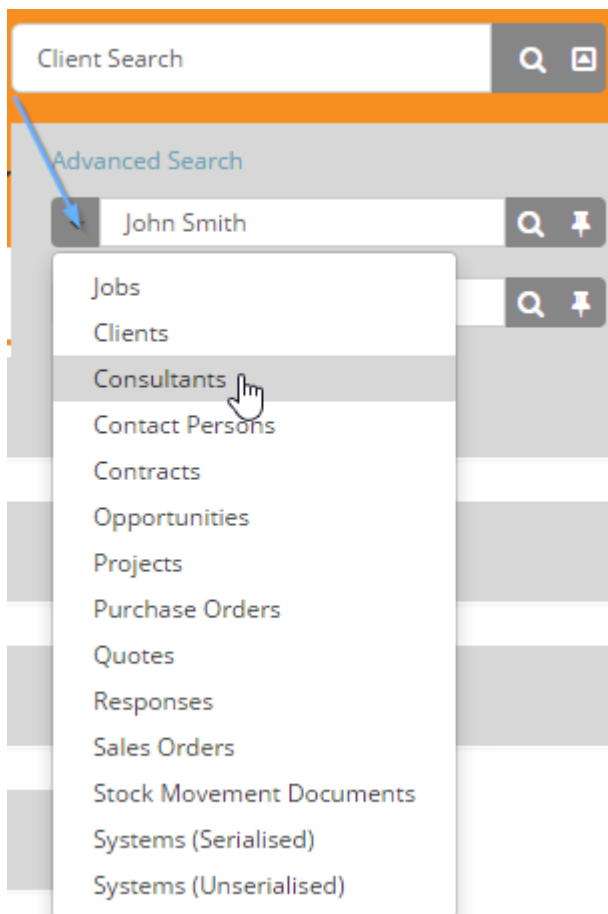
The easiest way to look up a site by name is to use the search box provided. Typing the first few letters in the top right search box will generate a dropdown list for you to choose from. Clicking on the relevant site will open that site page.



Alternately, you could use the Advanced Search. Click on the arrow indicated.

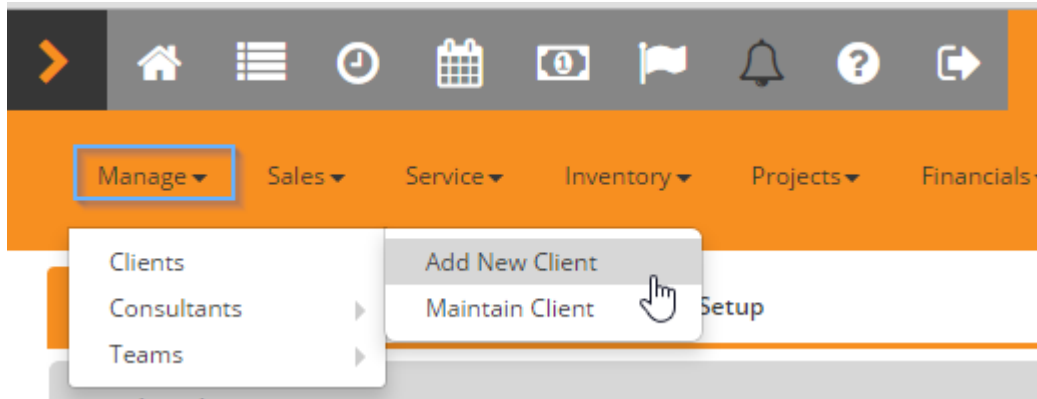


The dropdown lets you search various categories. Select one from the list and enter your search criteria in the search box. Click enter or the Search icon to search.



## Adding a new client

Before adding a new client, be sure to first check that the client does not already exist. Not only does this avoid duplication, it can also prevent a lot of confusion and save a lot of time. To add a new client click Manage -> Clients -> Add New Client.




This will bring up the following screen. A red asterisk (\*) indicates a mandatory field. Fill in the Client name, client Telephone and Contact Email Address. You may also want to fill in the Parent Client. Click SAVE when you are done.

A screenshot of the 'Add Client Details' form. The form is titled 'Add Client Details' and has a 'Save' button in the top right corner. The form contains several input fields: 'Client Name' (mandatory, marked with a red asterisk), 'Account No', 'Telephone' (mandatory, marked with a red asterisk), 'Contact Email', 'Website' (with an external link icon), 'Trading As', 'NameCode', 'Fax', 'Reply to Address', and 'VAT Reg Number'. There are also two checkboxes: 'Hidden' and 'Credit Hold'. Below these are two search fields for 'Parent Client' and 'Alternate Contract', each with a trash icon. At the bottom, there is a 'Contact Info' tab and a sub-form with fields for 'Physical Addr', 'Suburb', 'City/Town', 'Postal Code', 'Country' (a dropdown menu currently showing '- No Country Selected -'), 'Postal Address', and 'Code'.

## Adding a new contact person


For each client, it is usual to have at least one contact person with whom you will liaise. When a new client is created, Pulse automatically opens up a New Contact Person page where you can capture Contact Person information. Again the fields marked with a red asterisk (\*) are compulsory. The contact person can also have certain rights and responsibilities depending on what you select. When you have added all the relevant data, click on SAVE.

**Client Details** ▾ Sales ▾ Service ▾ Bookings ▾ Projects ▾ Inventory ▾ Client Financials ▾

Add/Update Contact Person Details  Save

Title

FirstName  \* Surname

ID Number  Birth Date  

Telephone  \* Mobile Number

Email  \*

Client **Satellite Warehouse**

**Roles** Messages Employment Groups Reports

Role  Language

Position

Hidden  Company-wide rights

Group-wide rights  Use as default for Incidents

Main Sales Contact Person  Don't send Campaigns

Can Update all Users at Client  Can Update all Users in Group


Should you require additional Client Contacts you can add them as necessary. First navigate to the Client where you want to add a new Contact. Click on Client details -> Contact Person. Use the Add Contact Person button. You may add as many contact people as you require.

**Client Details** ▾ Sales ▾ Service ▾ Bookings ▾ Projects ▾ Inventory ▾ Client Financials ▾

Update  
Contact Person  
Notifications

**Contact Person Details** Add Contact Person

Name	Jobs	Username	Company-Wide	Group-Wide	Default for Sales	Default for Service
Warehouse Man	Logged   Open   Closed	001815	No	No	No	No

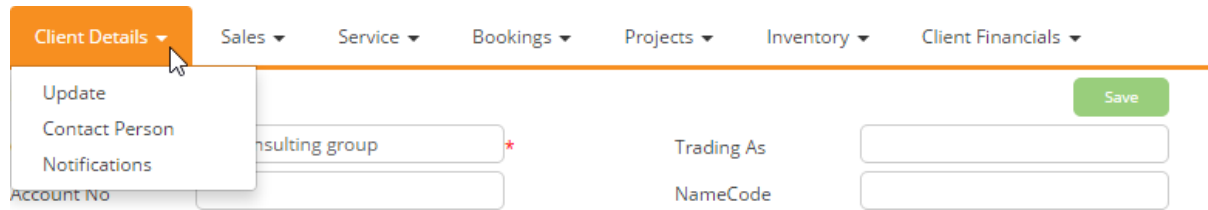
 Edit Cycles Move History

## Navigating within a client

When navigating around Pulse, note that there are 3 main tabs: Client Details; Sales and Service. Each of these tabs has sub levels. This organises the data better and prevents cluttering up the screen. To navigate to any of the sub levels, click on the tab name.

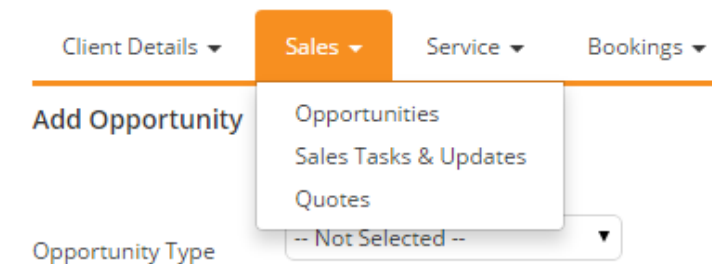
## Client Details sub levels

Client Details has 3 sub levels: Update, Contact Person and Notifications



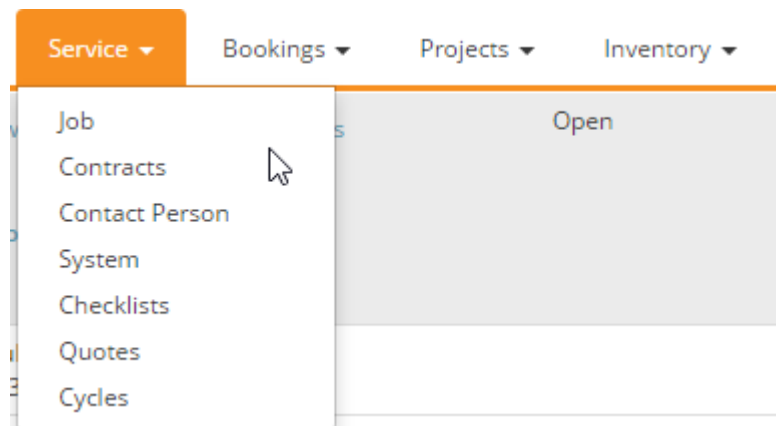
## Sales sub levels

The sub levels for Sales are as follows: Opportunities, Sales Tasks and Updates, Quotes



## Service sub levels

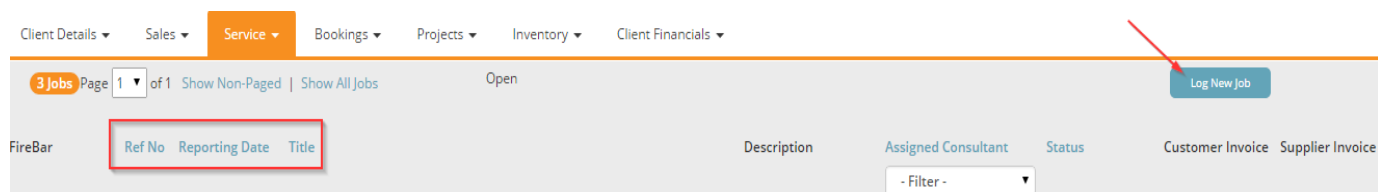
The sub levels for Service are Job, Contracts, Contact Person, System, Checklists, Quotes and Cycles



## Open a new Ticket

Navigate to the relevant client, then click on the Service tab and select the Job option from the dropdown. Note that headings in blue can be sorted. You can also filter by Assigned consultant

Click on Log New Job.



The following screen appears.

## Changing the Categories, eg. Priorities

On the left, fill in details of the ticket you are logging. Fill in the mandatory fields indicated by a red asterisk (\*). These fields relate to the severity of the issue and the type of issue. Also fill in the Reporting User and the Experiencing User (these may or may not be the same person). If either the Reporter or the Experiencing User is not already captured as a Contact in Pulse, you may capture their details from this screen by clicking on the (+) Button. This opens an Add New Contact person page and you fill in their details as above. After saving the new Contact's details, you may select them from the dropdown list. When you have captured all the details, click the SAVE button. This saves the ticket and allows you to further process it by allocating it.

## Assign a Ticket to a consultant/engineer

Once you have logged a ticket and saved the details, you can allocate the ticket to the relevant consultant in the relevant team. Select from the dropdown lists available. You may also want to change the status of the ticket once it has been assigned. Again, appropriate statuses are available from the dropdown list.

## Update an existing Ticket

To access an existing ticket first navigate to the Site. Then click on the Service tab and then select Ticket. All open tickets for that site will be listed here. You can open any existing ticket by clicking on the Ref No. Once open, you can update the ticket as necessary.



Client Details ▾ Sales ▾ **Service ▾** Bookings ▾ Projects ▾ Inventory ▾ Client Financials ▾

6 Jobs Page 1 ▾ of 1 Show Non-Paged | Show All Jobs Open

FireBar	Ref No	Reporting Date	Title	Description
In SLA [Time to Update]Target: 16 Jul 2015 8:23 AM (General SLA)	000377	15 Jul 2015 15:21:23	Change of template	Please can you update the address on our Invoice template to reflect our new business premises.
In SLA [Time to Update]Target: 15 Jul 2015 15:50 PM (General SLA)	000376	15 Jul 2015 15:19:07	Our lines appear to be down	No incoming calls this morning. Please check if our lines are down
No SLA (Age: 00h06m)	000375	15 Jul 2015 15:16:21	New Report Request	We require a new report to show all current clients with Active contracts. The report should show the client name and Account number, the contract name and Contract number and the Start and End dates. The Client Name and Contract Name fields should allow sorting alphabetically

Note that in addition to updating the different fields you may also add update notes and share these with your site contact if necessary.

000377 [Icons] In SLA [Time to Update]Target: 16 Jul 2015 8:23 AM (General SLA) Move Save &

New ▾ Team 1st Line ▾ Consultant Yannick Hatcher (1) [At Work] ▾

Details Systems Project Checklists Relates To Contract Schedule Client Sign-Off Attachments

Change of template \* Reporting Date 15 Jul 2015 15:21:23 Category Admin ▾

Please correct our telephone no as well \* Deadline 00:00 Call Type Internal Company Request \*  
 Please can you update the address on our Invoice template to reflect our new business premises. Reporting User Joe Bloggs Service Type -Not Set-  
 Experiencing User Joe Bloggs Severity Priority 3 \*  
 Failure Reason -Not Set-  
 Customer Reference  
 Network Speed (Mbps) 0  
 Notes

Financial Summary Details  
 Billable Hrs 00h00 Hours 00h00  
 Billable Hrs Amt £ 0.00 Actual Hrs Amt £ 0.00  
 Total Tvl £ 0.00 Total Tvl £ 0.00  
 Km £ 0.00 Km £ 0.00  
 Total Billable £ 0.00 Total Cost £ 0.00


Page 1 ▾ of 1 Show All Pages | Show System and Hidden Responses

Date	Who	Description	Act Hrs	Travel To	Travel From	Doc
15 Jul 2015 15:25:06	Admin Admin ▾	<div style="border: 1px solid red; padding: 5px; display: inline-block;">Add a response</div>	00h00	00h00	00h00	n/a

Hide Response

## Link a Ticket to a Contract

To link a ticket to a contract first open the ticket. Navigate to the Contracts tab. All contracts relating to that Site will be listed here. Select the relevant contract by selecting the button to the left of the contract number. This effectively links the ticket to that contract.

000377  In SLA [Time to Update]Target: 16 Jul 2015 8:23 AM (General SLA)

New Team 1st Line Consultant Yannick Hatcher (1) [At Work]


Details Systems Project Checklists Relates To **Contract** Schedule Client Sign-Off Attachments

Contract Show Closed Contracts

Number	Avail Tokens	Tokens to Deduct	Name	Type	Status	Start Date
<input type="radio"/> *No Contract*		<input type="text" value="0.00"/>				
<input checked="" type="radio"/> 00004	-10.00	<input type="text" value="0.00"/>	test	SLA Maintenance	New	01 Nov 2012

### Check a contract from the ticket

To check the details of a contract click on the Contract Number. This opens the Contract in a new page and you may add/edit details as necessary. Remember to save any changes you may have made.

000377  In SLA [Time to Update]Target: 16 Jul 2015 8:23 AM (General SLA)

New Team 1st Line Consultant Yannick Hatcher (1) [At Work]


Details Systems Project Checklists Relates To **Contract** Schedule Client Sign-Off Attachments

Contract Show Closed Contracts

Number	Avail Tokens	Tokens to Deduct	Name	Type	Status	Start Date
<input type="radio"/> *No Contract*		<input type="text" value="0.00"/>				
<input checked="" type="radio"/> 00004	-10.00	<input type="text" value="0.00"/>	test	SLA Maintenance	New	01 Nov 2012

### Link a PO, SO or Quote to a Ticket


On the Relates to tab, you can enter a PO that relates to this ticket. Alternately, you may link a Quote or a Sales Order to this ticket by clicking in the block shown and selecting from the list.

000376  In SLA [Time to Tentatively complete]Target: 16 Jul 2015 9:21 AM (General SLA)

New Team 1st Line Consultant Russell Preece (2) [At Work]

Details Systems Project Checklists **Relates To** Contract Schedule Client Sign-Off Attachments

Purchase Order Reference No

Quote Doc No	Subject	Value	Approved	Accepted	Rejected	All Invoiced	
<input type="text"/>							

Sales Order Doc No	Subject	Value	Status	
<input type="text"/>				