User Guide

For

Pulse Service

Contents

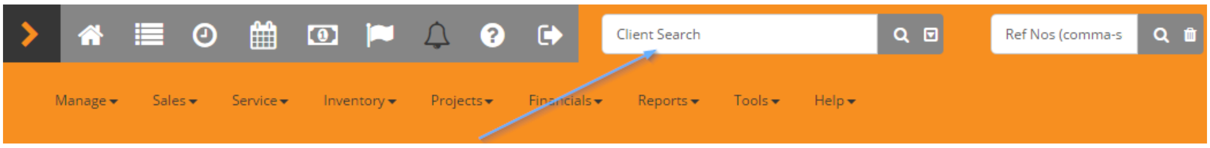
Introduction

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.

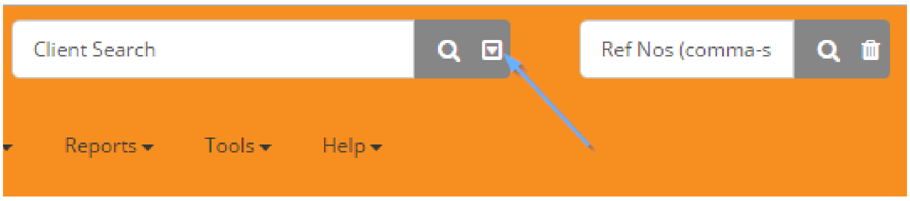
As a registered Pulse user, you can also receive one-to-one help by contacting Pulse Business Software Limited. See http://www.pulse-software.co.uk/deployment/support/ for contact details.

Looking up an existing site

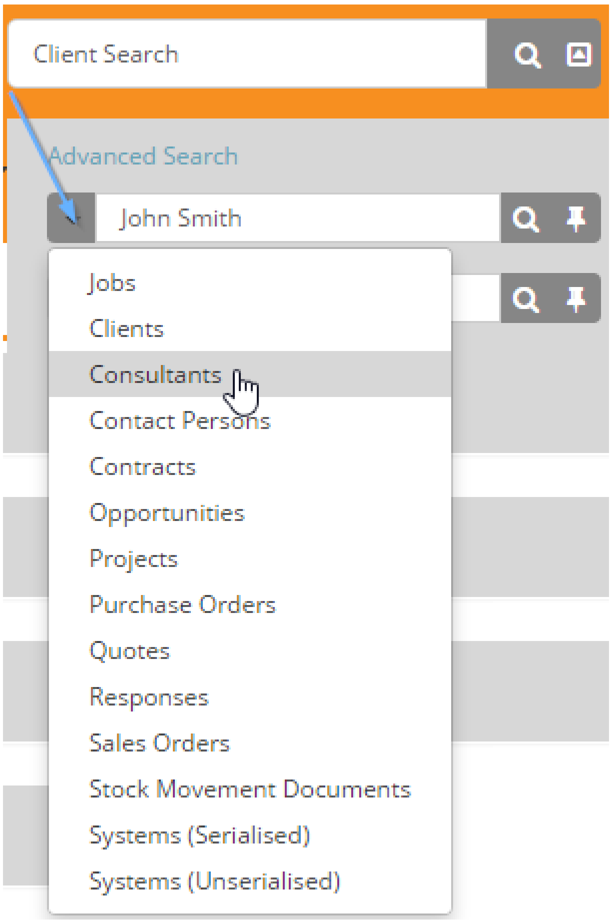
The easiest way to look up a site by name is to use the search box provided. Typing the first few letters in the top right search box will generate a dropdown list for you to choose from. Clicking on the relevant site will open that site page.



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

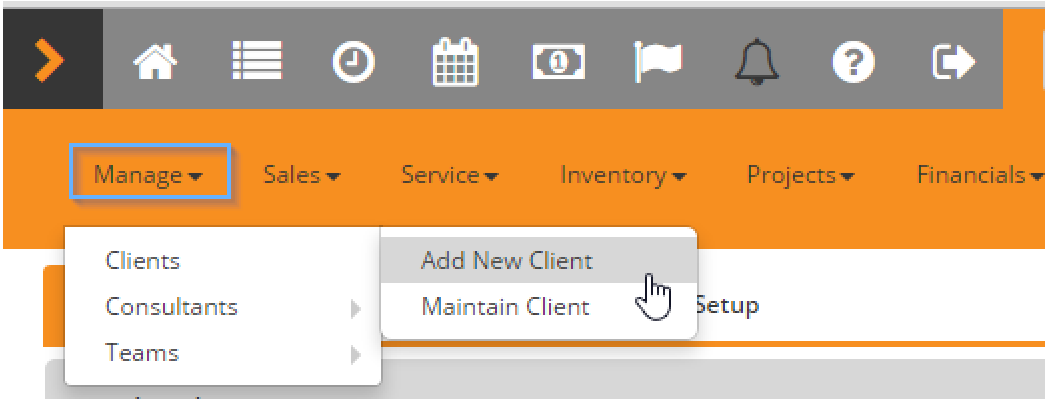


The dropdown lets you search various categories. Select one from the list and enter your search criteria in the search box. Click enter or the Search icon to search.

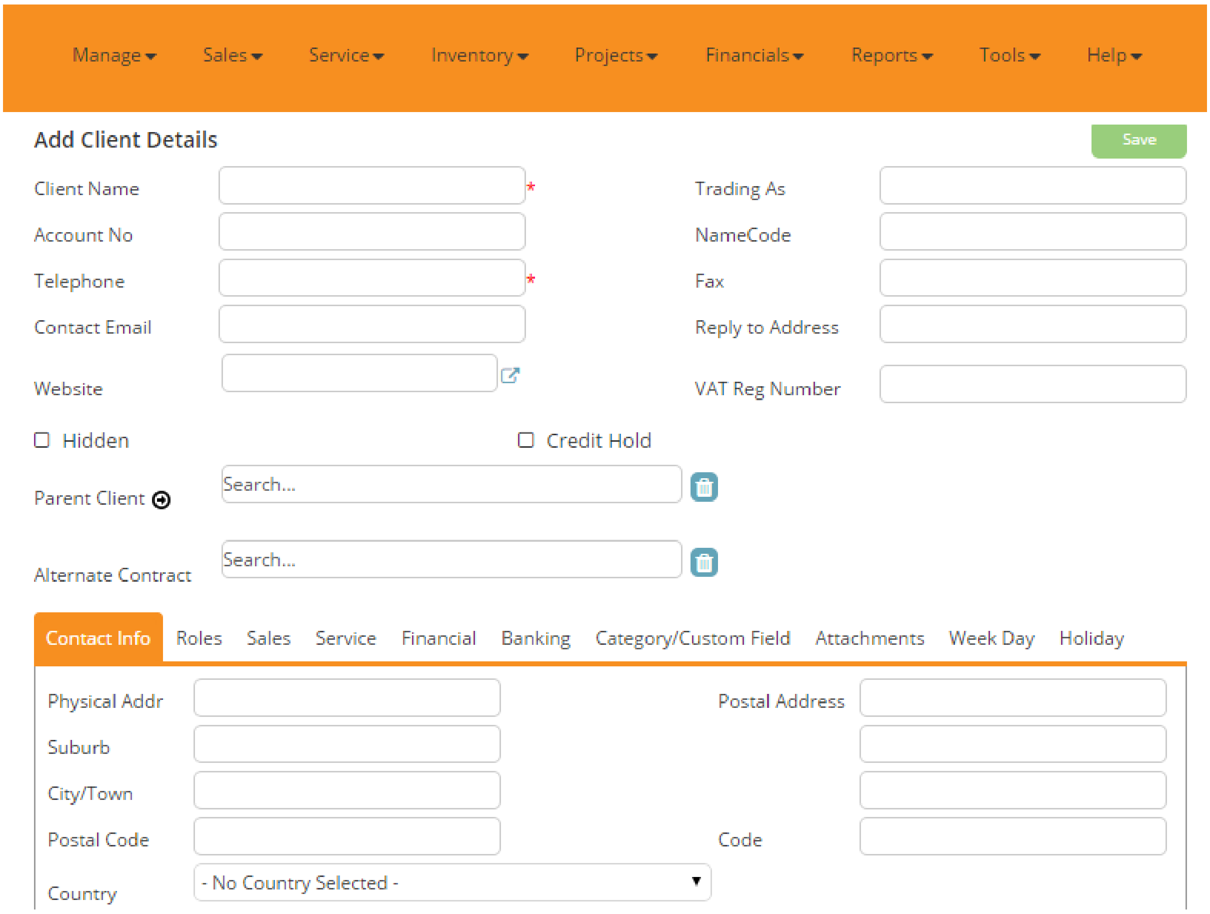


Adding a new client

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.

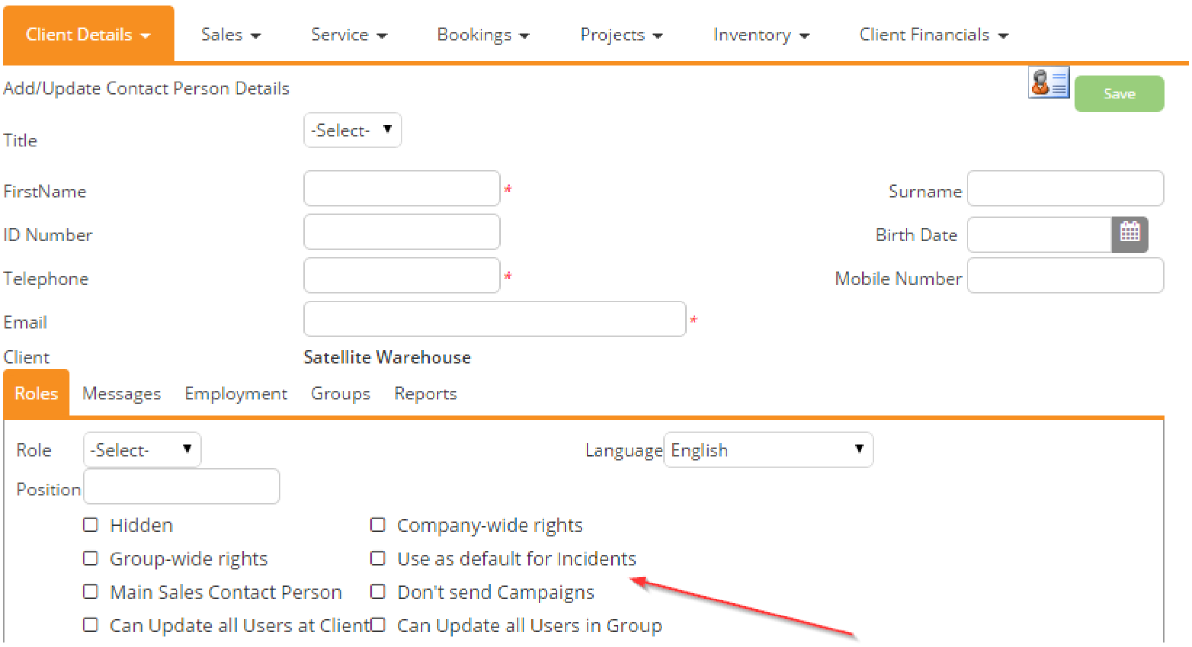


This will bring up the following screen. A red asterisk (*) indicates a mandatory field. Fill in the Client name, client Telephone and Contact Email Address. You may also want to fill in the Parent Client. Click SAVE when you are done.

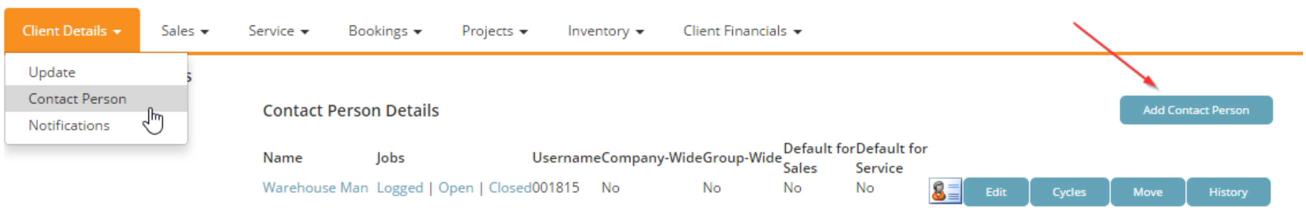


Adding a new contact person

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.



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.

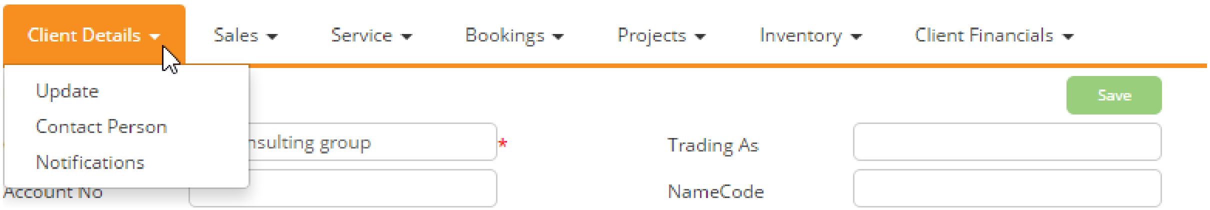


Navigating within a client

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.

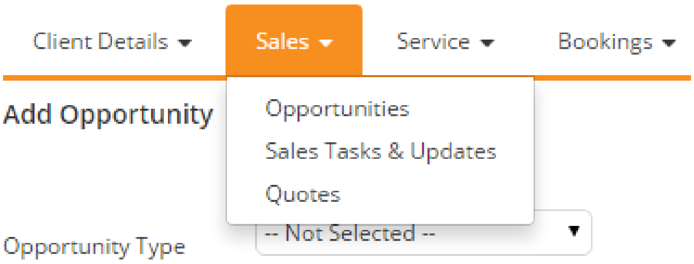
Client Details sub levels

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



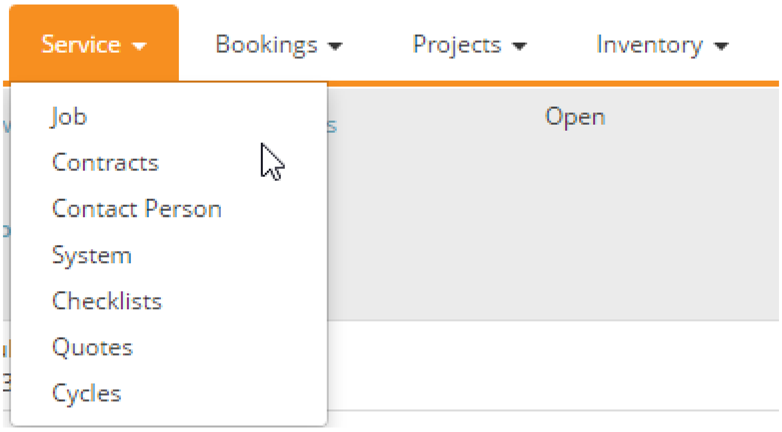
Sales sub levels

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



Service sub levels

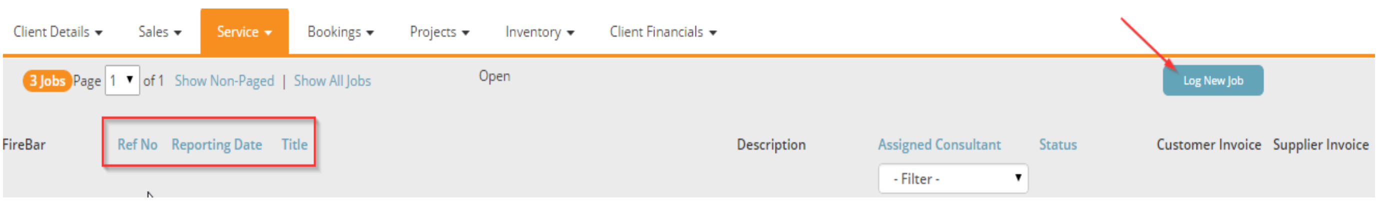
The sub levels for Service are Job, Contracts, Contact Person, System, Checklists, Quotes and Cycles



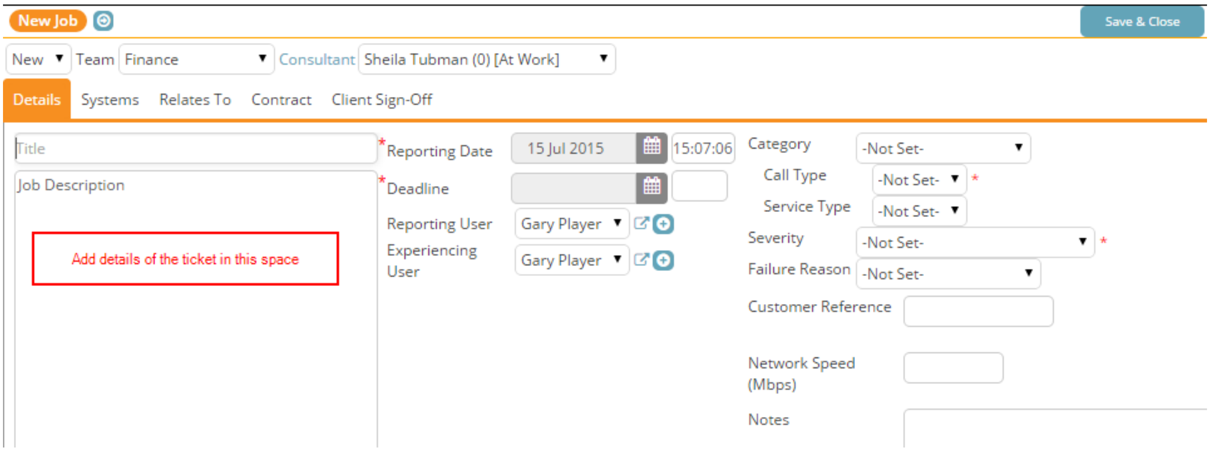
Open a new Ticket

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.

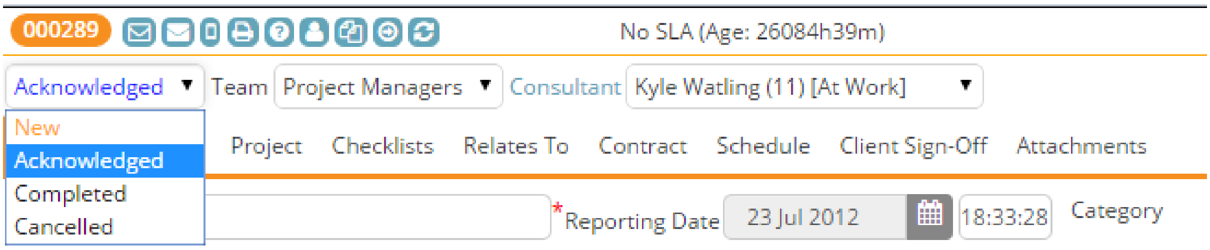


Changing the Categories, eg. Priorities

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.

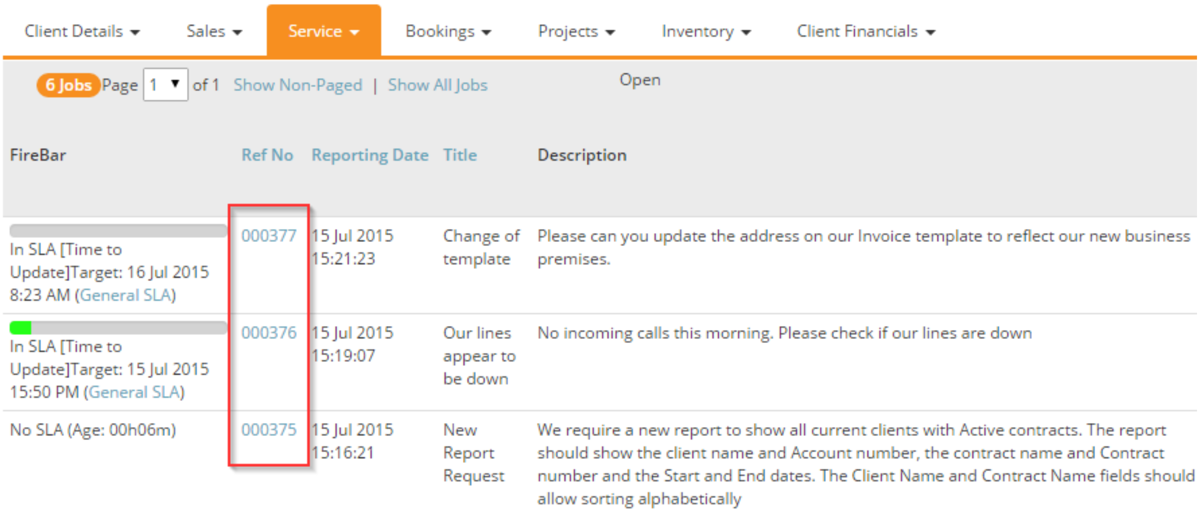
Assign a Ticket to a consultant/engineer

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.

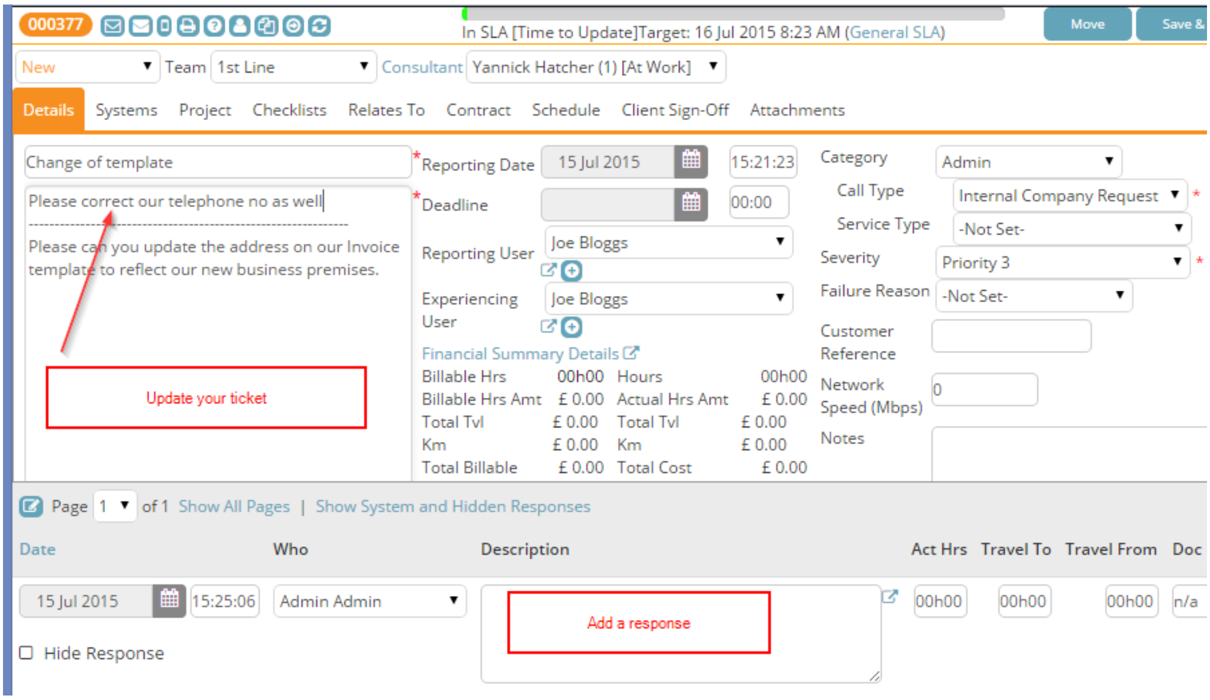


Update an existing Ticket

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.

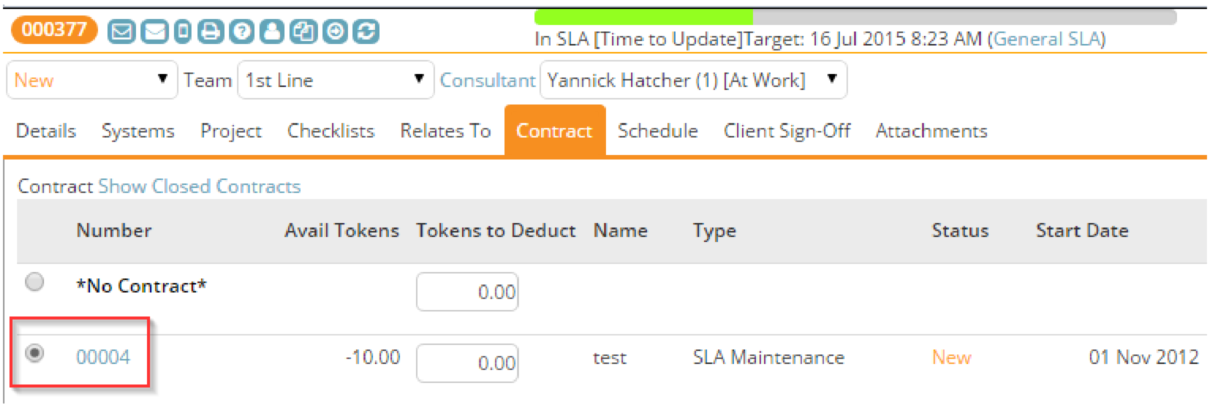


Note that in addition to updating the different fields you may also add update notes and share these with your site contact if necessary.



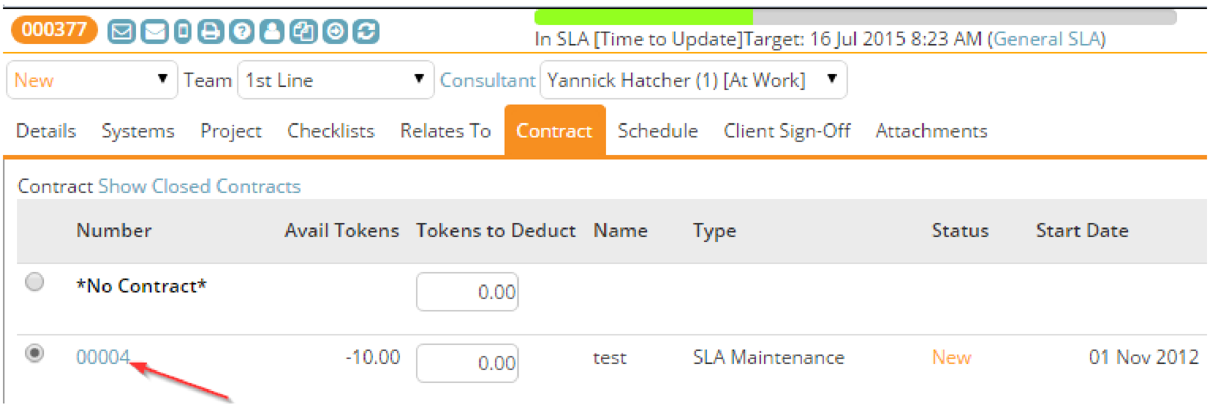
Link a Ticket to a Contract

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.



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.



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.