



***Pulseway* PSA**

ONBOARDING SERVICES

PULSEWAY PSA: OVERVIEW

Pulseway's powerful business management software seamlessly integrates with Pulseway RMM to deliver a powerful and complete solution suite to manage your clients and your business more efficiently. The business management solution includes functionality for ticketing, project management, accounting, CRM, time-tracking, invoicing, billing and more.



PULSEWAY PSA: ADVANCED ONBOARDING

Advanced Onboarding is designed for new customers on the Pulseway PSA software. With the help of an Implementation Specialist, you will receive both technical guidance to properly configure the Pulseway PSA software and assistance to smoothly migrate your critical data (where applicable).

PRICE: \$1495

TIME ALLOCATED: 8 hours

LOCATION: Meetings will be conducted using GoToMeeting™

REQUIREMENTS: Customer must have a PSA account live prior to Onboarding

ONBOARDING TOPICS

- 1. Welcome Intro Call
Discovery and Data Migration Review | up to **1 hour**
- 2. Administration, HR and CRM | **1.5 hours**
- 3. CRM con't and Finance Administration | **2.0 hours**
- 4. Finance con't | **1.5 hours**
- 5. Service Desk and Project Management | **1.5 hours**
- 6. Home, Reporting & Onboarding
Review | **1.5 hours**

1. WELCOME INTRO CALL/DISCOVERY AND DATA MIGRATION

This introductory session will help our team discover and pinpoint your business needs in order to tailor the onboarding sessions more accurately. As part of this conversation our team will discuss the data import into Pulseway PSA from your current solution or other data sources (where applicable).

The details below are for a typical onboarding and could be modified based upon the Welcome Intro Call.

- Introduction of team
 - Review your business needs
 - Review and identify which modules your business will be using
 - Review your current accounting platform and goals looking to achieve for contract and billing management
 - Walk through the implementation checklist
 - Discuss Data Migration and Importing options
-

2. ADMINISTRATION, HR AND CRM

Administration Section:

- Setting up company locations
- Setup company configuration items used throughout the PSA
- Demonstrate how to create Custom fields
- Demonstrate how to customize pre-built data lists used throughout the modules
- Administrative Work - Tasks that will make it easy for employees to track non-customer facing time entries
- CRM Settings - review Account Types and Opportunity types
- Security Roles – determines what access level employees have in Pulseway PSA
- Tax Settings are created here to make sure we apply the appropriate tax rates for services or product sales

HR Section:

- Departments – we create the departments you need – to track your employees
- Job Titles – create the job titles needed in your company
- Skill Sets – used to store what skills your company has and used as way to search when assigning Tasks in Projects
- Employees – we will walk through all the tabs on the Employee profile- making sure you understand where they apply

CRM Section:

- Review the CRM Dashboard categories and discuss where the data comes from and how to use it
 - Walk through the Creation of Accounts
 - Created Manually, Imported or QuickBooks
 - Walk through all the Account Tabs
 - Walk through the Contacts folder and review all settings
 - Review how to create Activities and schedule future activities
-

3. CRM Con't and FINANCE Administration

CRM Section Con't:

- Create Opportunities for pipeline management
- Show how to create Quotes tied to Opportunities
- Walk through the process of converting the Quote into:
 - Project, Contract or Sales Order

FINANCE Administration Section:

- QuickBooks Enterprise or Desktop synchronization
 - Finance administration configuration for items not auto-created by QuickBooks defining the billing items used in contracting (this is the area that defines all the billing accounts and categories used in the rest of the FINANCE module)
 - Review the Project Dashboard categories and discuss where the data comes from and how to use it
-

4. FINANCE Con't

- Review the Project Dashboard categories and discuss where the data comes from and how to use it
- In the Contracts folder we will review Time and Material / Recurring Services / Fixed Price / Retainer By Hours and Retainer By Dollar
- We will walk through the Approve and Post process in the Billing Review folder
- Billing Process – how to take what we Approved and Posted and place it on an Invoice
- We will generate Invoices using Invoice Templates and and show you how to send them right from Pulseway PSA to any customers
- Payments and how to manage via Pulseway PSA or from QuickBooks via Sync
- We'll review the Vendors and payment process

5. SERVICE DESK AND PROJECT MANAGEMENT

Service Desk Section:

- Review the Service Desk Dashboard categories and discuss where the data comes from and how to use
- Walk through the Creation of Tickets
- Walk through How to enter Time , Notes and Expenses on a ticket
- Show user how to use the SEARCH grids in my Tickets and Tickets folders
- Discuss why you could see entries in Unknown Tickets folder and how to reduce number of entries
- Review Assets Management folder - Hardware and Software
- Knowledgebase entries created here or when closing a Ticket
- We'll walk through how to create Recurring Master Tickets
- If need to schedule and track onsite visits, we can create Service Calls

Project Management Section:

- Review the Project Dashboard categories and discuss where the data comes from and how to use it
 - We will learn how to Create a Project and review each tab
 - Can create Project from Scratch or Copy from a Template
 - We will walk through creating Tasks
 - Tasks / Milestones / Summary Tasks
 - Review how to use Search Grids in the All Tasks folder
 - Look at Resource Utilization and Multiple Gantt Charts
 - Focus on How to create a Template Projects
 - Show how to Archive a Project when complete
-

6. HOME, REPORTING AND ONBOARDING REVIEW

Home Section:

- Review the Dashboard categories and discuss where the data comes from and how to use it
- Review My Tickets and My Queues and My Tasks and My Service Calls
- Open My Calendar and talk about what can be displayed there
- Show how to use My Expense Reports and how to Submit
- Show how to create Time Sheets and how to submit
- Review the My Approvals folder - approve or reject Expense sheets and Timesheets
- Walk through the creation of Ticket Templates (saving time for ticket creation)
- The adjust Timesheets used by managers
- The adjust Expenses used by managers

Reporting and Onboarding Review:

In this final session your Implementation Specialist will go over the Reporting module and will review any outstanding areas you would like to cover or go over again (as time permits).



Contact our team for more information.

Email: sales@pulseway.com

Phone: 001 646 766 0785 or 00353 1 6190234
