



***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: ESSENTIAL ONBOARDING

Essential Onboarding is designed for new customers on the Pulseway PSA software. With the help of an Implementation Specialist, you will receive technical guidance to properly configure the Pulseway PSA software for CRM and Service Desk management.

**PRICE:** \$495

**TIME ALLOCATED:** 4 hours

**LOCATION:** Meetings will be conducted using GoToMeeting™

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

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## ONBOARDING TOPICS

1. Administration, HR, CRM & Service Desk | 2 Hours |
2. Project Management, Home & Reporting overview | 2 Hours |

# 1. 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 –you 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 the Account Tabs
  - Walk through the Contact folder
  - 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
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## **2. 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
- 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
- Focus on How to create a Template Projects
- Show how to Archive a Project when complete

### **Home Section & Reports:**

- 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 create Time Sheets and how to submit
  - Walk through the creation of Ticket Templates (saving time for ticket creation)
  - Overview of reports and how to run
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Contact our team for more information.

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