USER MANUAL

PULSE

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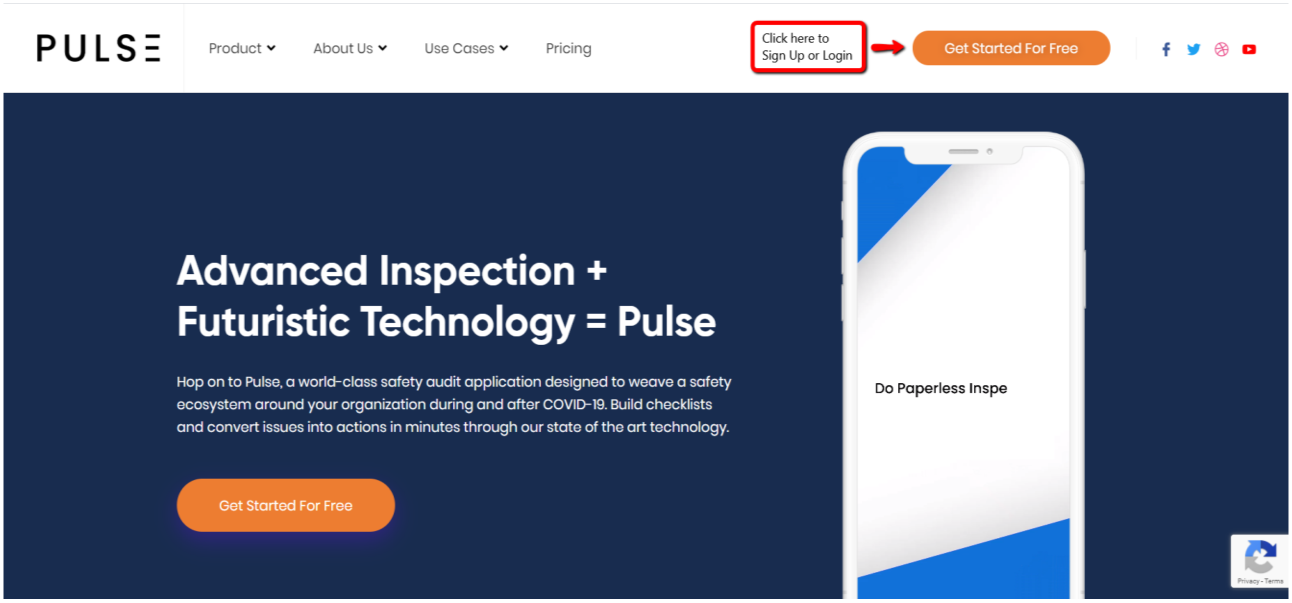
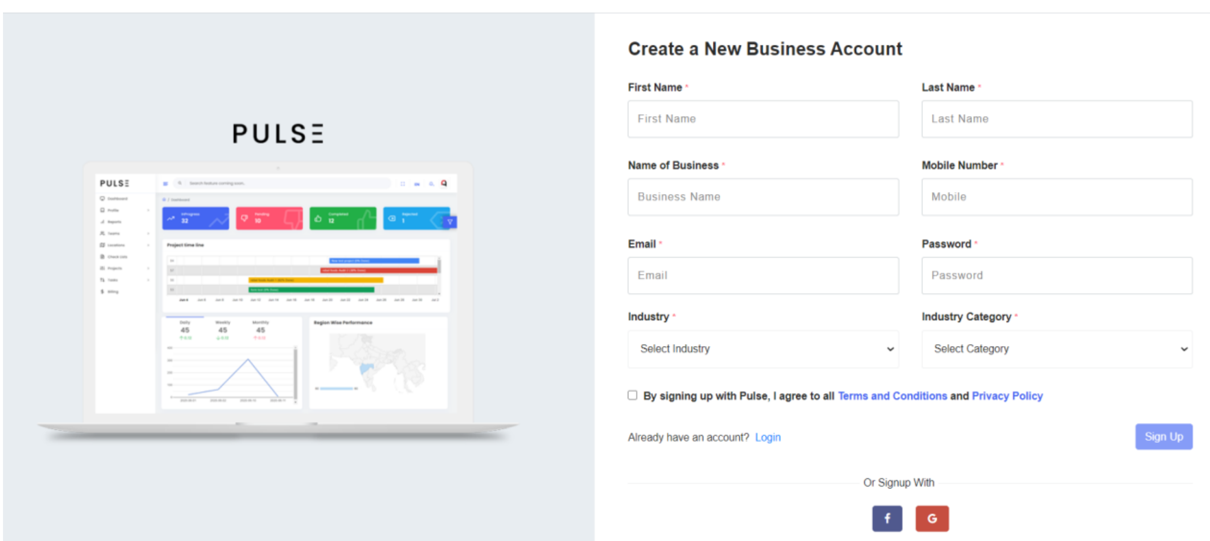
1. Home Page



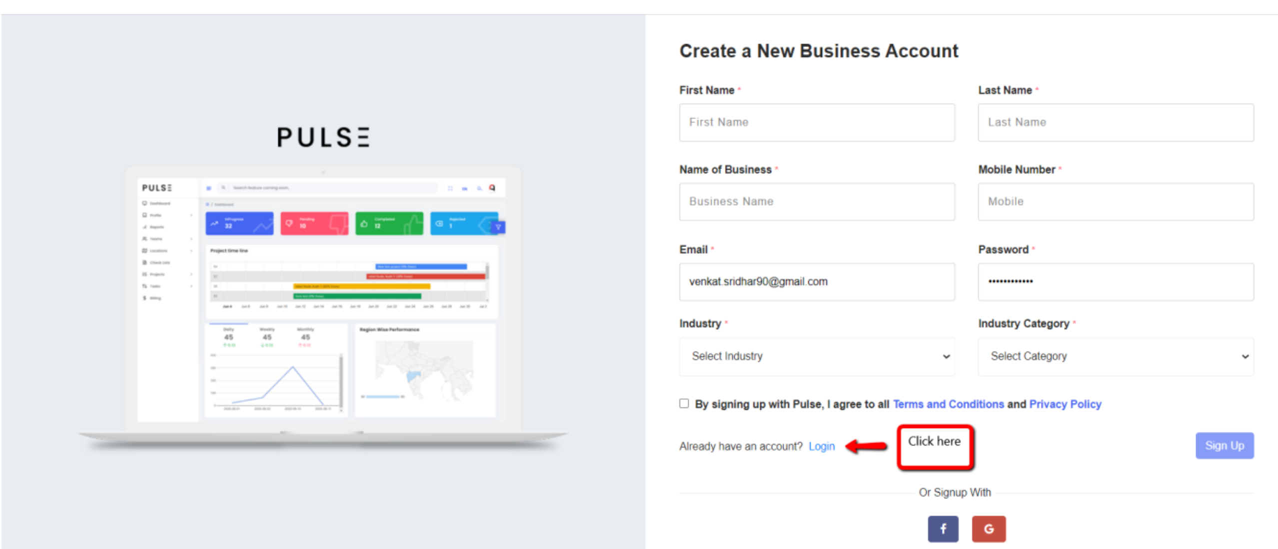
- Visit the Pulse website at https://www.pulsepro.ai/
- To begin your journey with Pulse, register as a business by clicking on the button “Get Started For Free” at the top right of the page.
- You will be taken to the Sign Up page upon clicking the button.

2. Sign Up

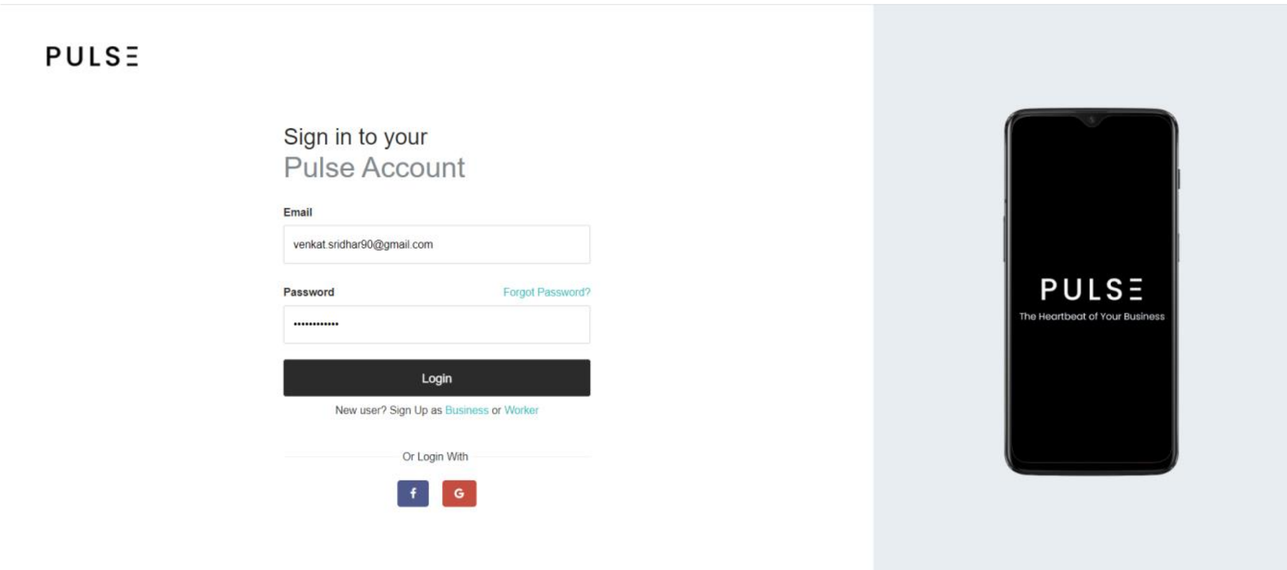


- Once you have reached the signup page, start filling up the details of your business along with your personal details. The various details that you need to fill are –
    - First Name
    - Last Name
    - Business Name
    - Mobile Number
    - Email
    - Password
    - Industry
    - Industry Category
- All the above details are mandatory
- Agree to the terms and conditions and privacy policy before clicking on the signup button
- Password Rule
    - At least 1 lowercase letter
    - 1 uppercase letter,
    - 1 digit
    - Length must be greater than or equal to 8 characters.
- Alternatively, you can sign up with your Facebook account or Google account
- Once you have successfully registered, a verification email will be sent to your registered email address. Click on the button 'here' in your email to activate your account.

3. Login



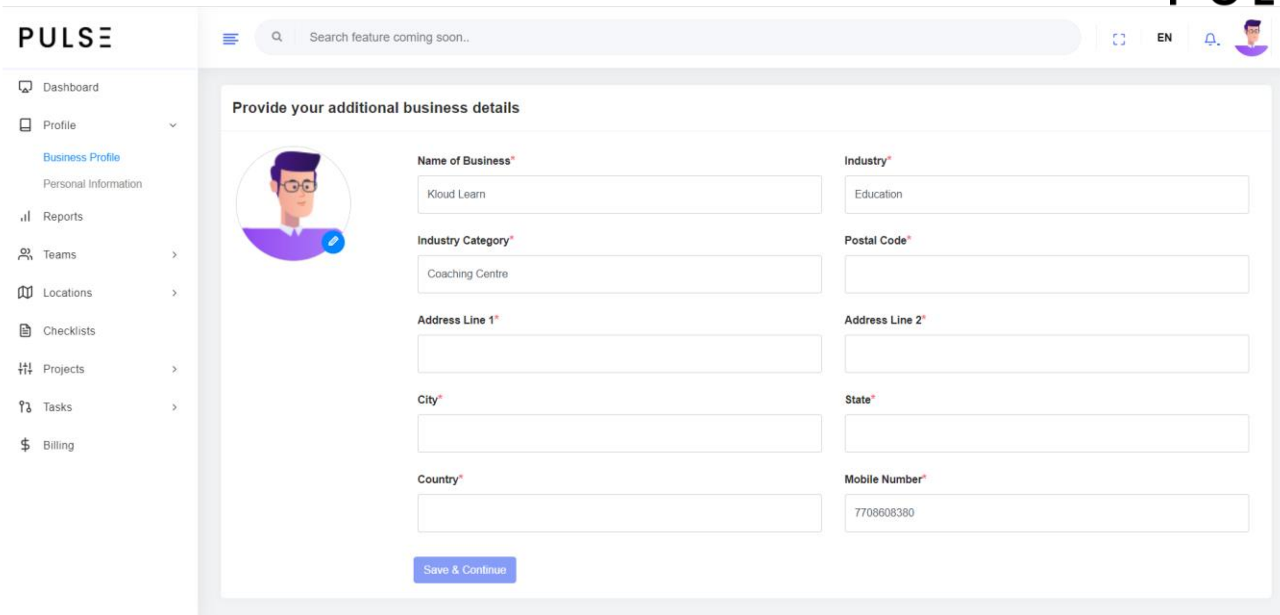
- Once you have signed up and activated your account, the next step is to log in to your personalized Pulse dashboard.
- You can reach the login page from the signup page by clicking the Login link
- In the login page, enter your email address and password to log in to the system.



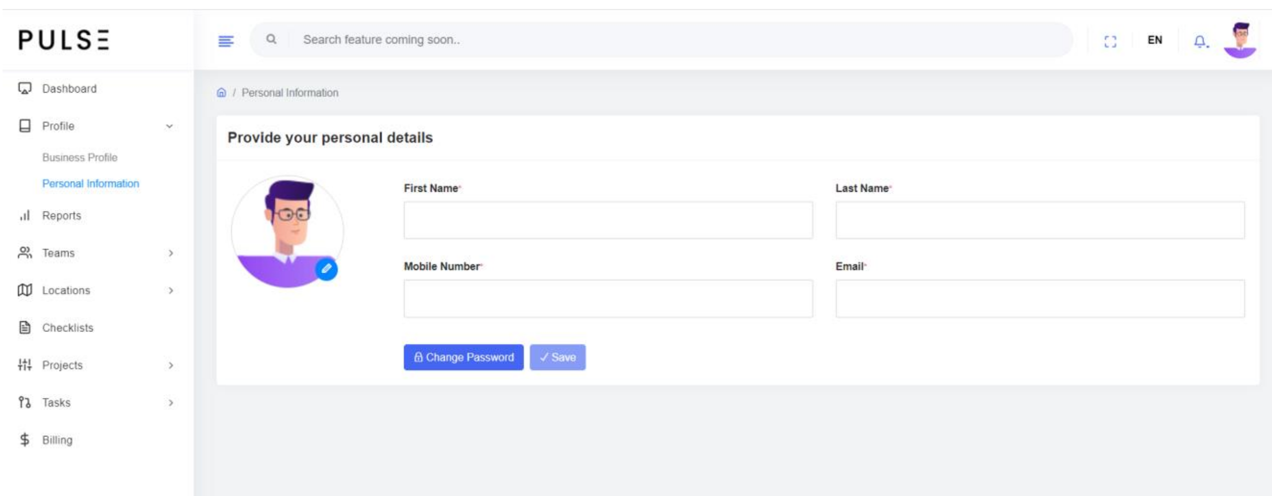
- Additionally, you can reset the password by clicking the 'forgot password' link. You'll be asked to enter your email address to which the instructions to reset your password will be sent.
- You can also sign in to Pulse using your Gmail or Facebook account.

4. Profile

- This section lets you update and add your business profile and personal details.
- To update your business profile, navigate to Profile > Business Profile in the sidebar.
- You can change the name of your business, mobile number industry, and industry category. The details will be pre-populated from the information you had provided during sign up. You also have to enter postal code, address line 1, address line 2, city, state, and country once you are on the screen as they are mandatory details.



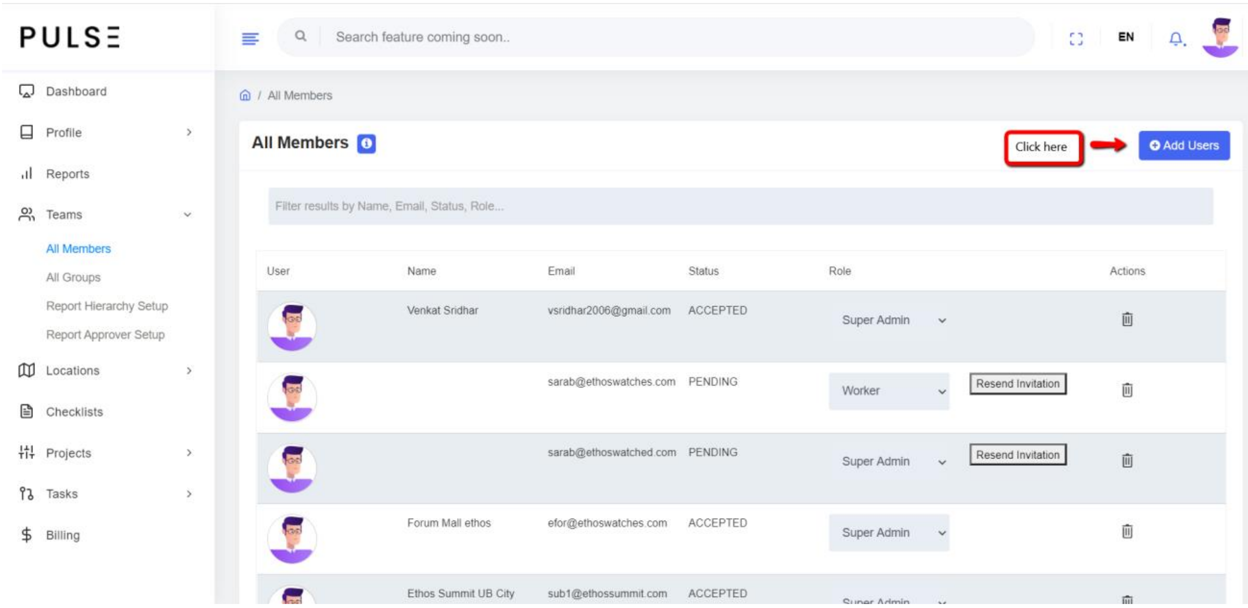
- To update your personal details, navigate to Profile > Personal Details in the sidebar.
- You can add/edit your first name, last name, mobile number, and email.



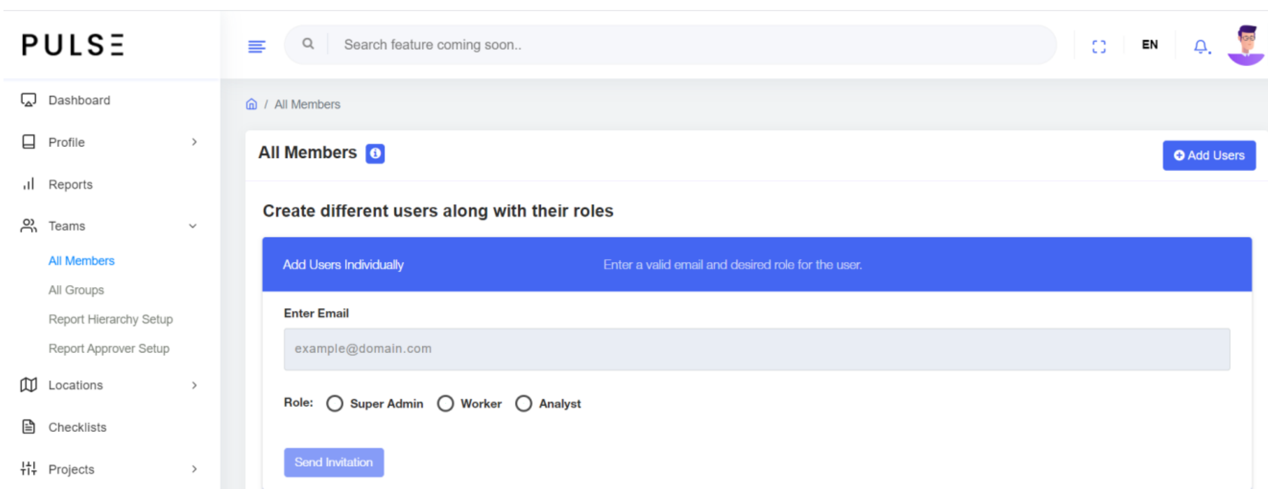
5. Teams

5.1 All Members

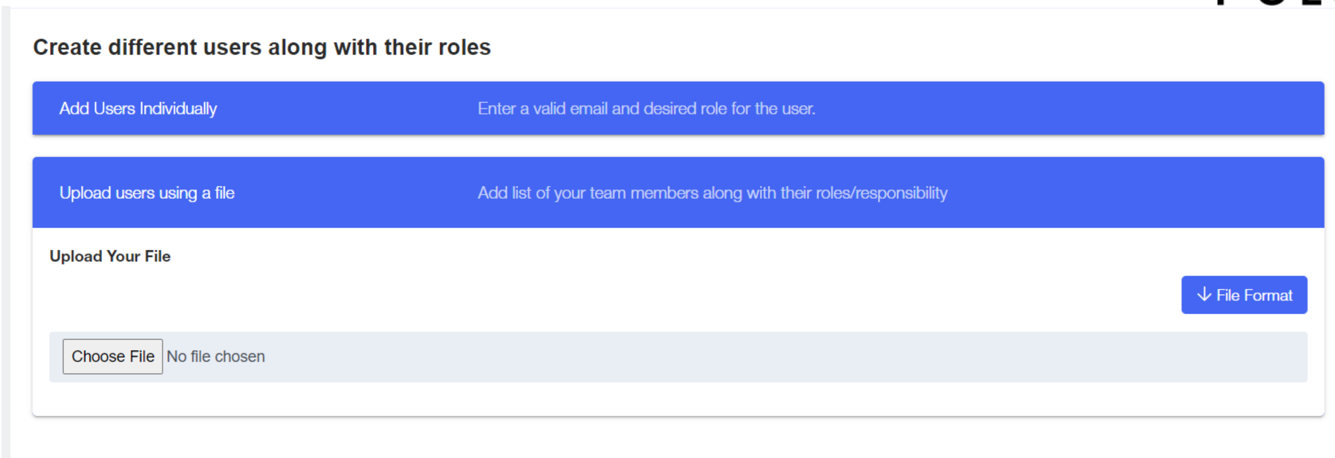
- The first step in your journey with Pulse includes adding your team members. To do this, navigate to Teams > All Members in the sidebar.
- Here you will see a list of all the members in your organization. You can also search for a user here.



- To add a new member, click on Add Users.
- In the add user section, you have to enter the email address and the role of the user. An invitation will be sent to the person who has to accept it and register with his/her basic details.



- There are three kinds of user -
  - Super Admin – Has access to all the features in the Pulse dashboard. When you register the business for the first time, you will be the super-admin by default.
  - Worker – Can access only tasks section and profile section
  - Analyst – Can access only task section and profile section
- You can also add members in bulk. Navigate to the upload users using a file section.

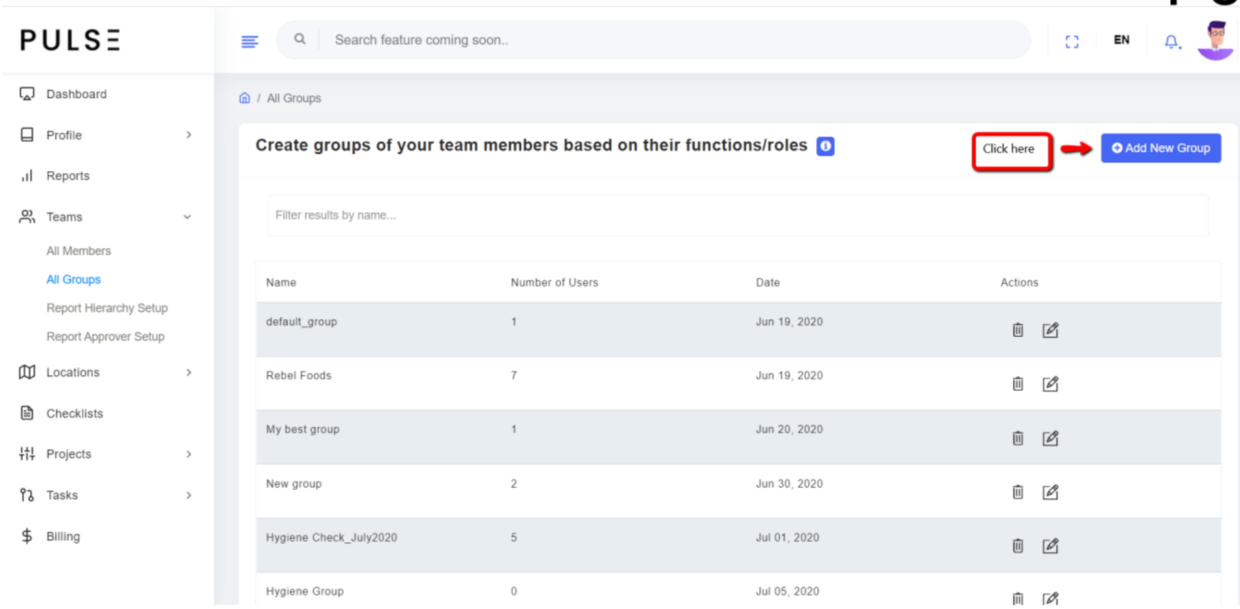


- Click on the file format button to download the sample file with dummy data. Modify the data accordingly. Add the email address and the roles of the team members and upload them back to the Pulse portal.

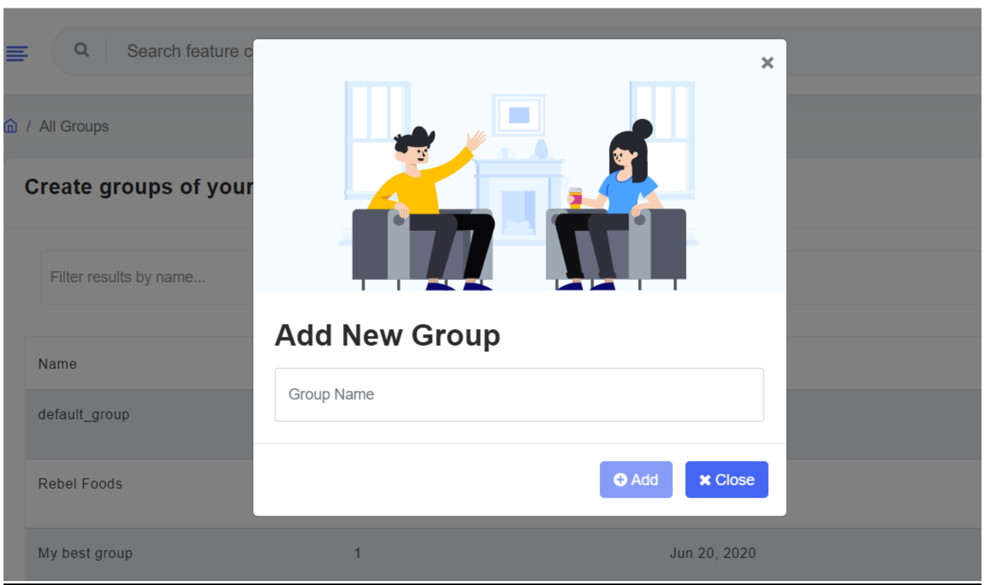
	A	B	C	D
1	Email	Role		
2	abhilasha@gmail.com	ROLE_SUPER_ADMIN		
3	shobhana@gmail.com	ROLE_ANALYST		
4				
5				
6				

5.2 Groups

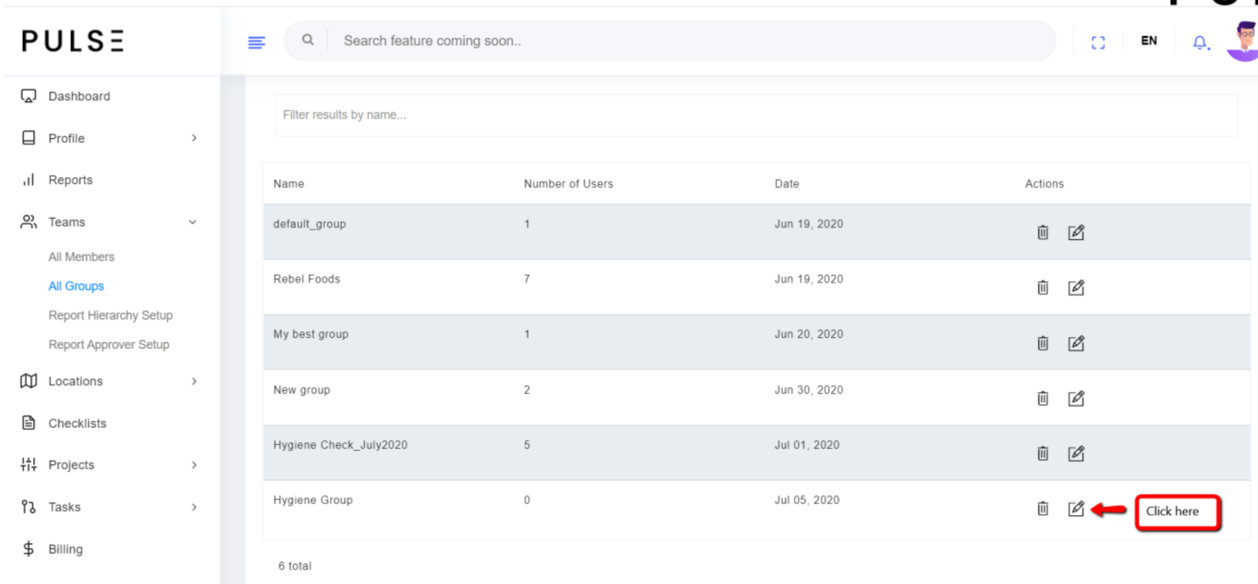
- Groups are a collection of team members who have been segregated based on their roles/functions.
- To add/manage groups, navigate to Teams > All groups
- You can see an existing set of groups. You can add/edit/delete a group.
- To add a group, click on Add New Group button



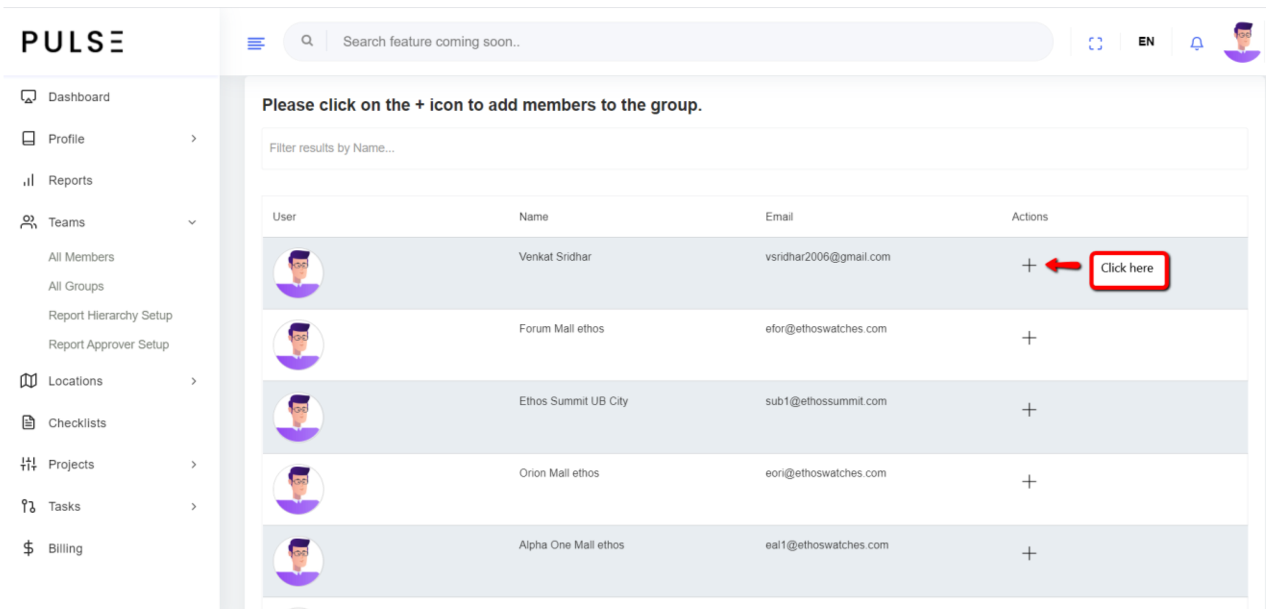
- Give a name to your group.



- Click on edit against a group to start adding members to the group



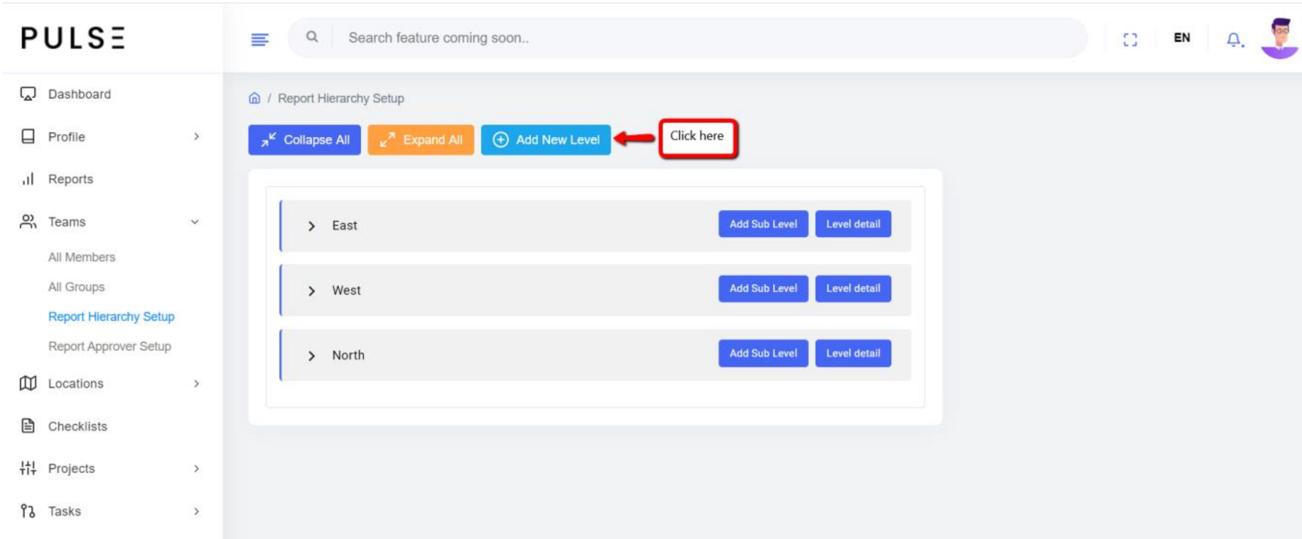
- Click on the + button against a member to add him/her to the group.



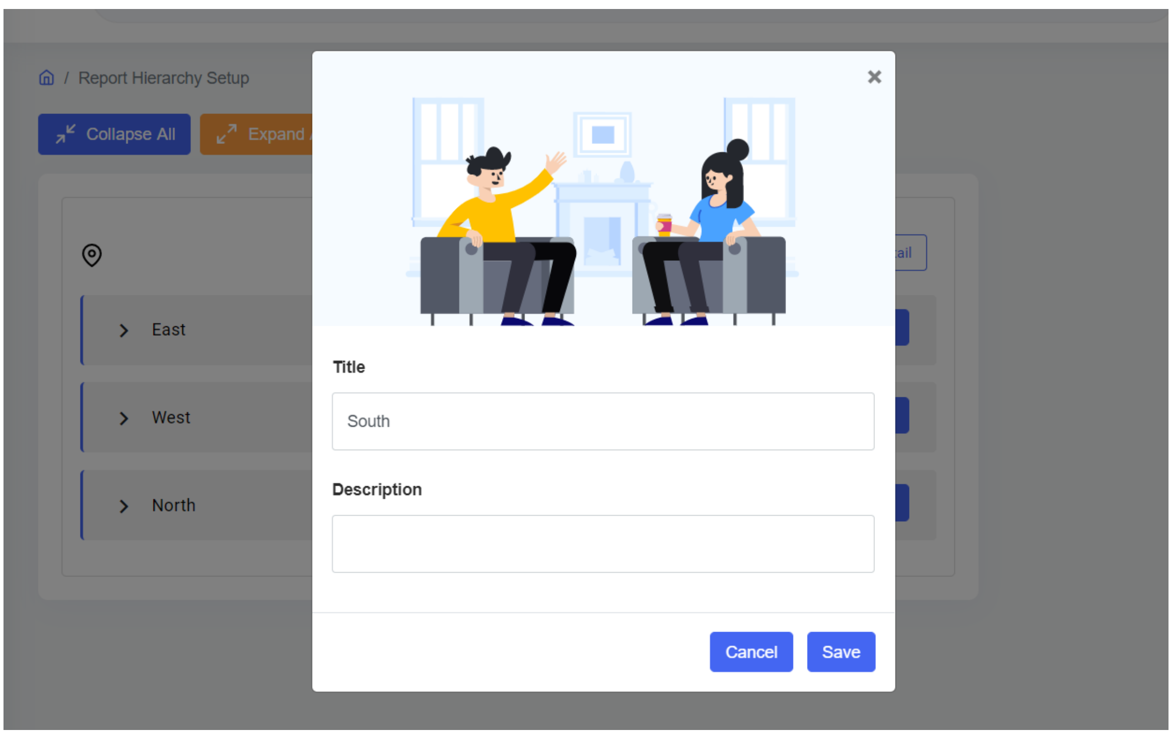
5.3 Report Hierarchy Setup

- This section is used to manage the hierarchy structure of your employees within Pulse.
- To access this section, navigate to Teams > Report Hierarchy Setup in the sidebar.
- You will see a list of levels and sub-levels defined. A level is a cluster of branches under which every branch (location) of your organization can be listed.

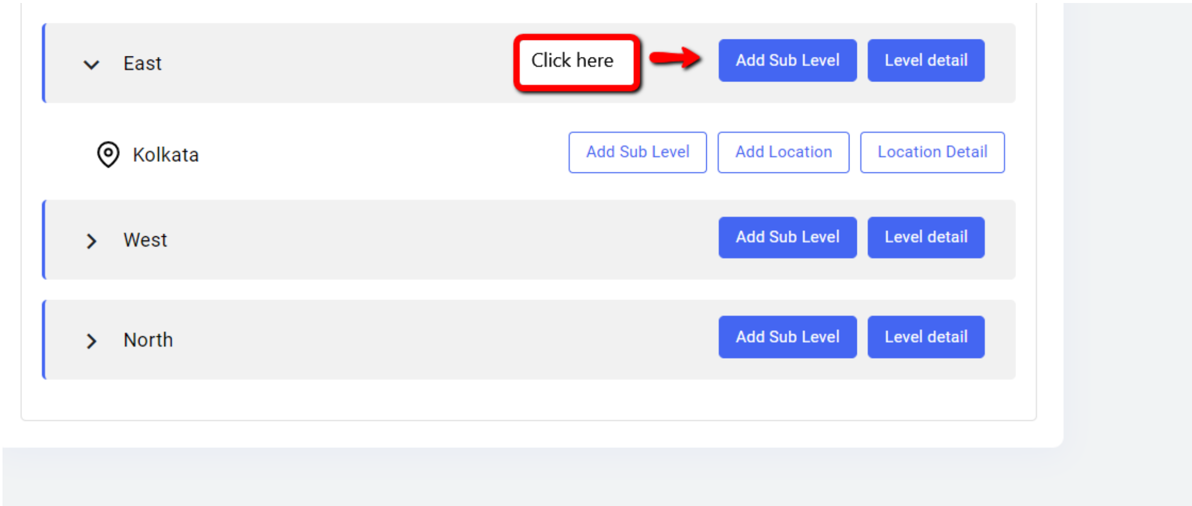
- If you are a new customer, you can start by adding a new level. Click on the Add new level button.



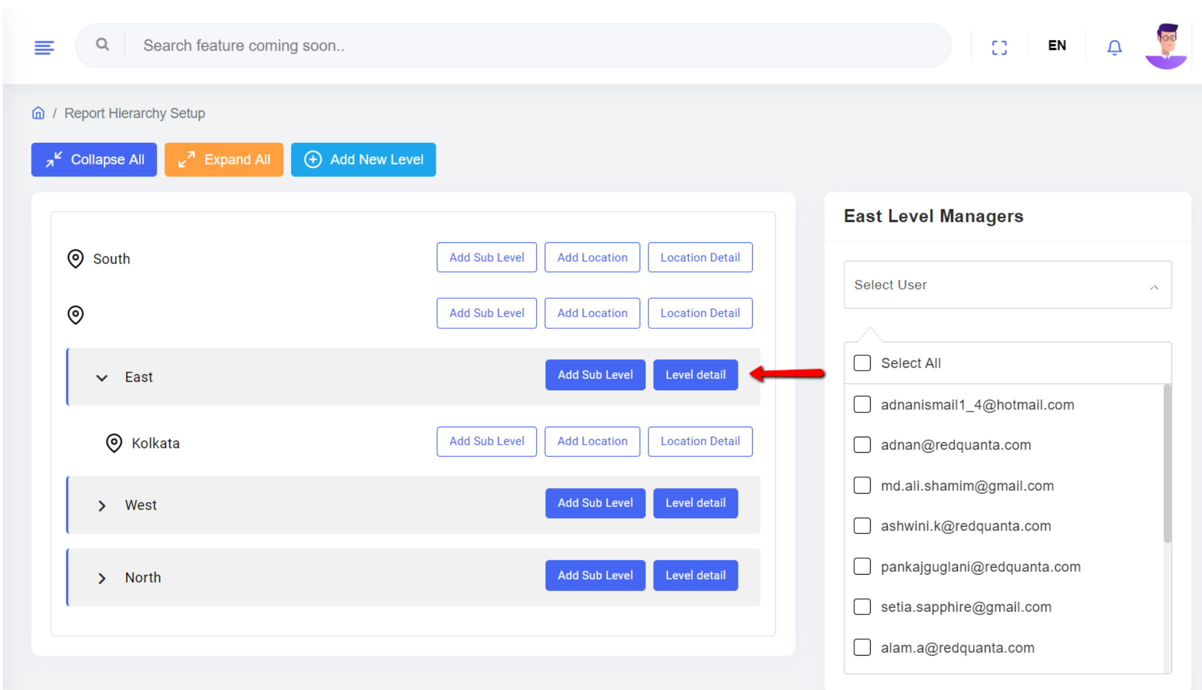
- Enter the name and description of the new level.



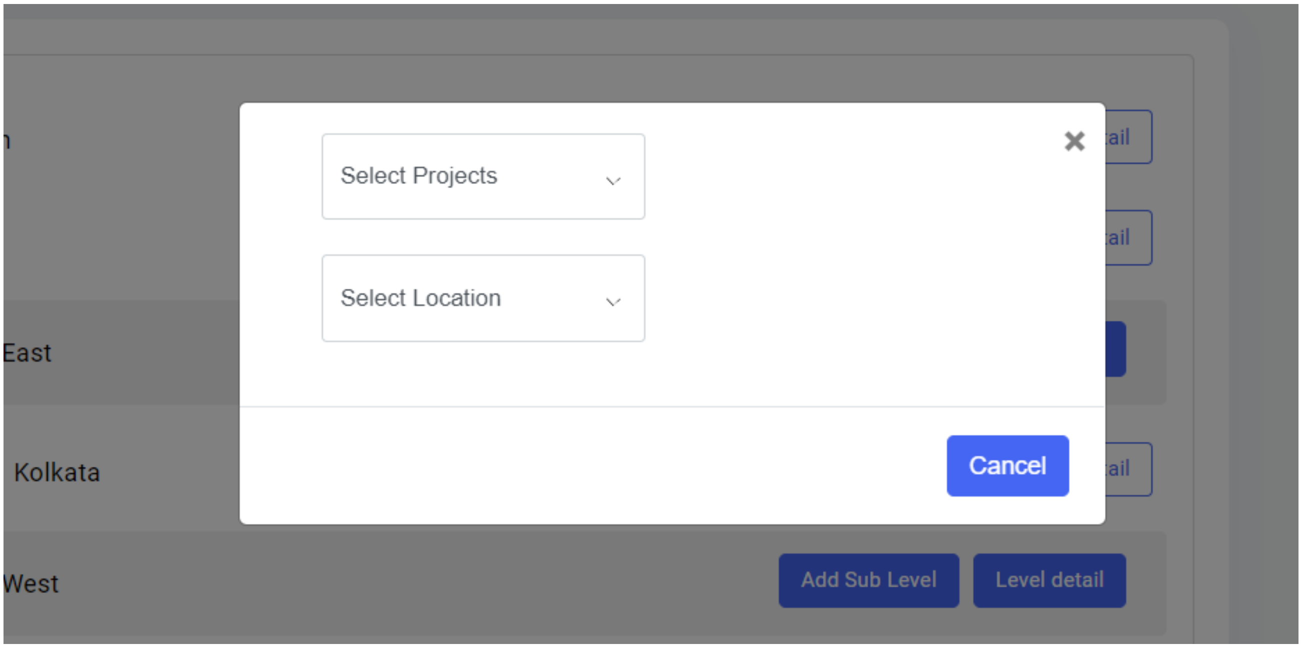
- You can add a new sub-level to any level or add another level below the sub-level by clicking the Add Sub Level button.



- Clicking on Level Details will display a list of team members and you can assign a person from the list as the manager of the level.

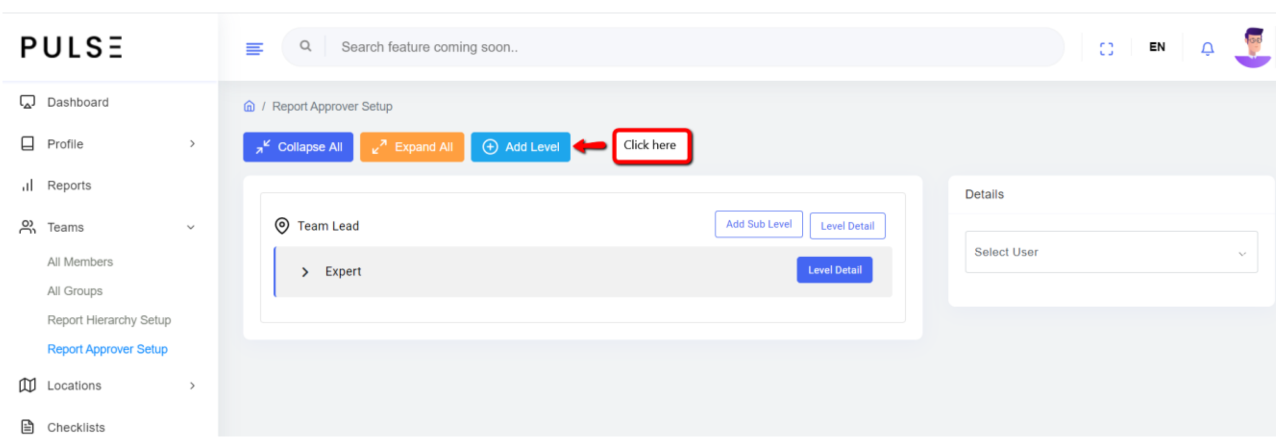


- You can assign location details to a level if it doesn't have a sub-level defined. Or you can assign a location to the sub-level. Choose the project first and then select one of the filtered locations based on the project selected.

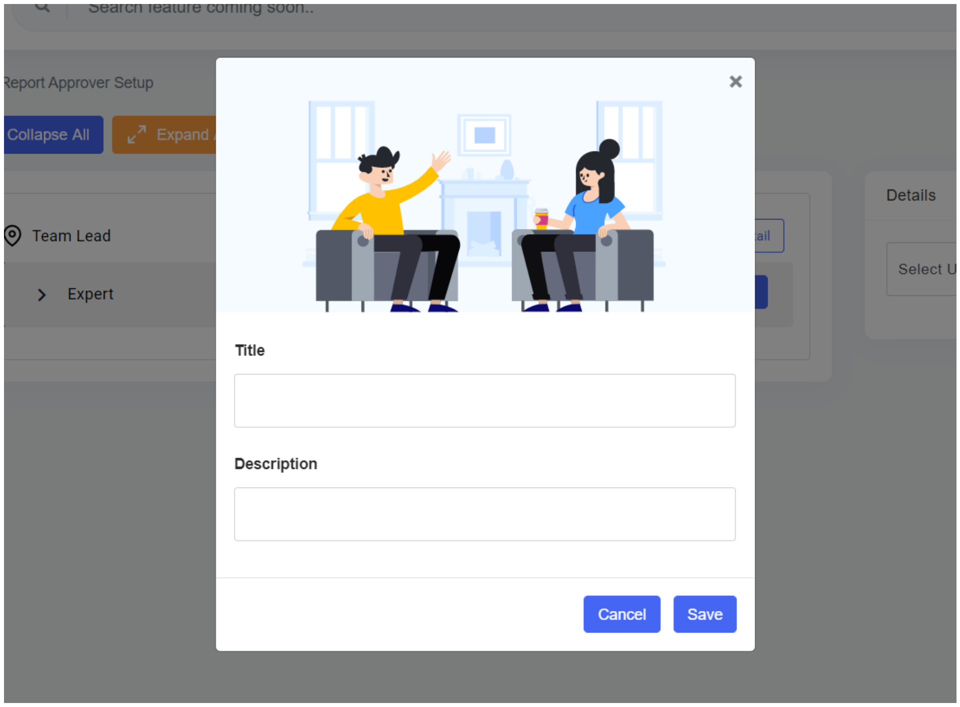


5.4 Report Approver Setup

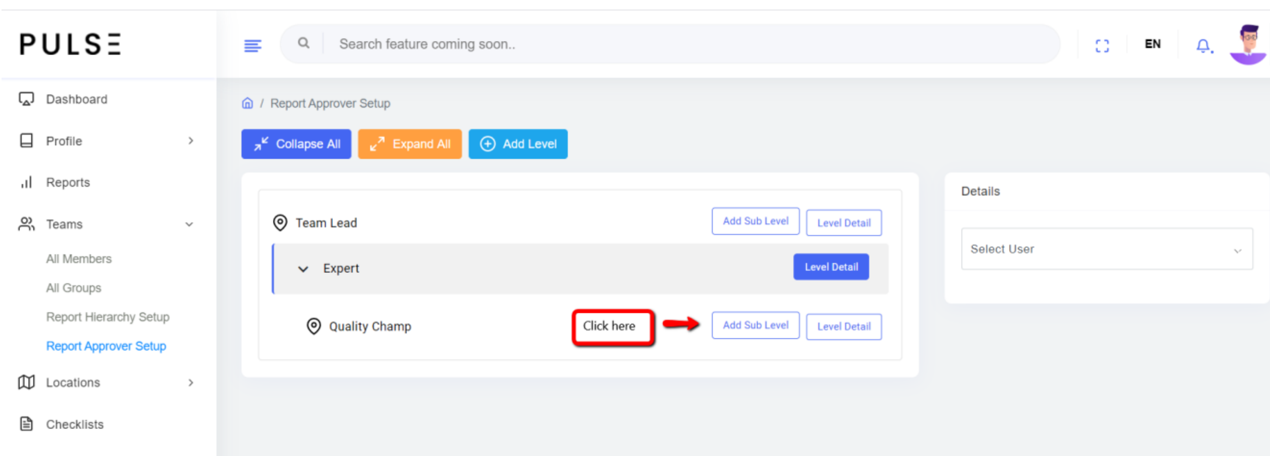
- Report Approver Setup helps you to create the hierarchy of your team members within Pulse.
- To access Report Approver Setup, navigate to Teams > Report Approver Setup
- Once here, you will be shown a list of existing approvers and their sub-levels. If you are a new user, you can start creating a new approver by clicking Add new level button.



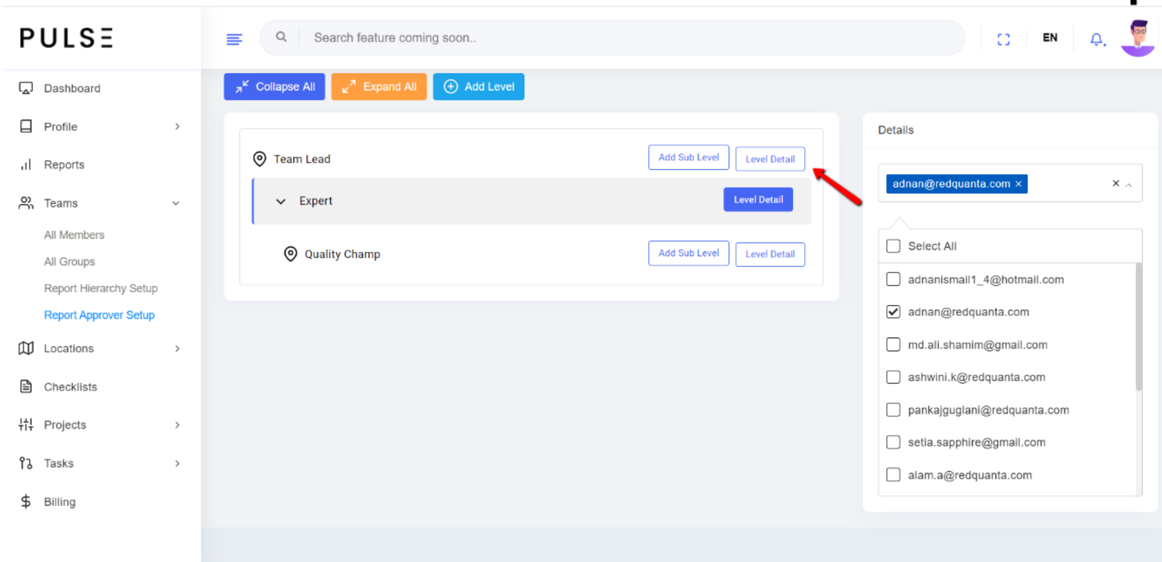
- Give the title and description of the role.



- You can add a sub-level to this level by clicking on add sub-level button

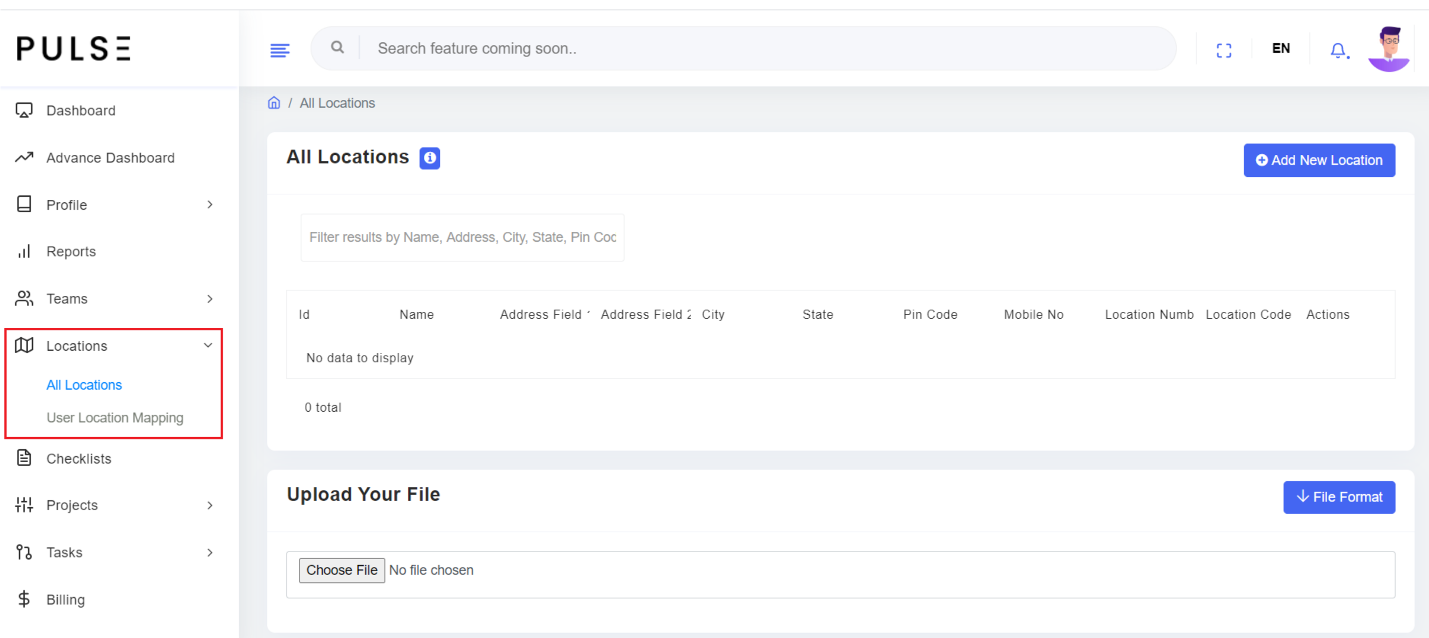


- You can associate one or more users to a level (provided there are not sub-level associated) and to a sub-level by clicking the Level Details button.



6. Locations

- Locations are the places where you wish to conduct the inspections. It could be the different stores of your organization or different branches located across the geography. To create a new location, navigate to the Locations menu option in the dashboard after logging in.

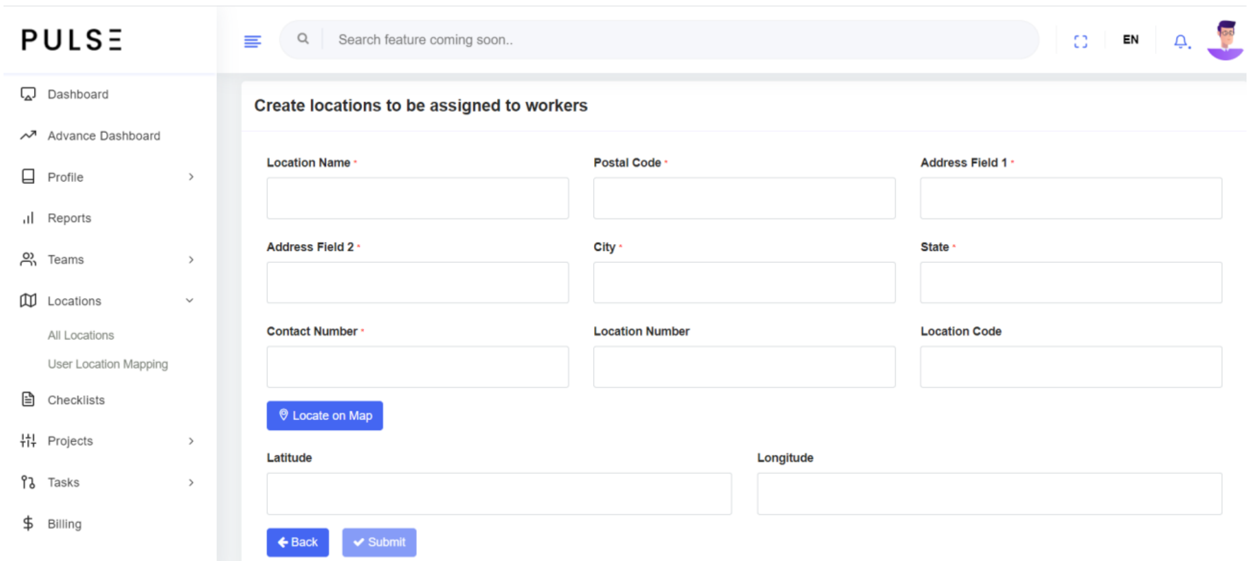


- By default, you will be at the 'All locations' page.

- You can add a new location individually or add multiple locations in bulk using the upload option.

6.1 How to add a location individually

- Click on Add New Location button on the ‘ All locations’ page. You will be displayed a location form to fill.



- The various fields in the address form include
    - Location Name – This is the name of the store or branch in that location. This is the name that will be used across the Pulse dashboard to point to this location.
    - Postal Code – Enter your postal code here and based on the entered code, the Address field 2, city and the state will be auto-populated.
    - Address Field 1- This is a mandatory field
    - Address Field 2 – This is a mandatory field
    - City – This will be filled based on your Postal Code. This field cannot be manually filled.
    - State – This will be filled based on your Postal Code. This field cannot be manually filled.
    - Contact Number – This is a mandatory field. It is the contact number of the store or branch location.
    - Location Number – This is an optional field where you can enter a number that has been assigned to this location in your other systems for easy tracking
    - Location Code - This is an optional field where you can enter a number that has been assigned to this location in your other systems for easy tracking

- Locate on Map – Upon clicking this button, the address entered by you in the form will be captured and displayed on the map for you to verify. This is an optional step.

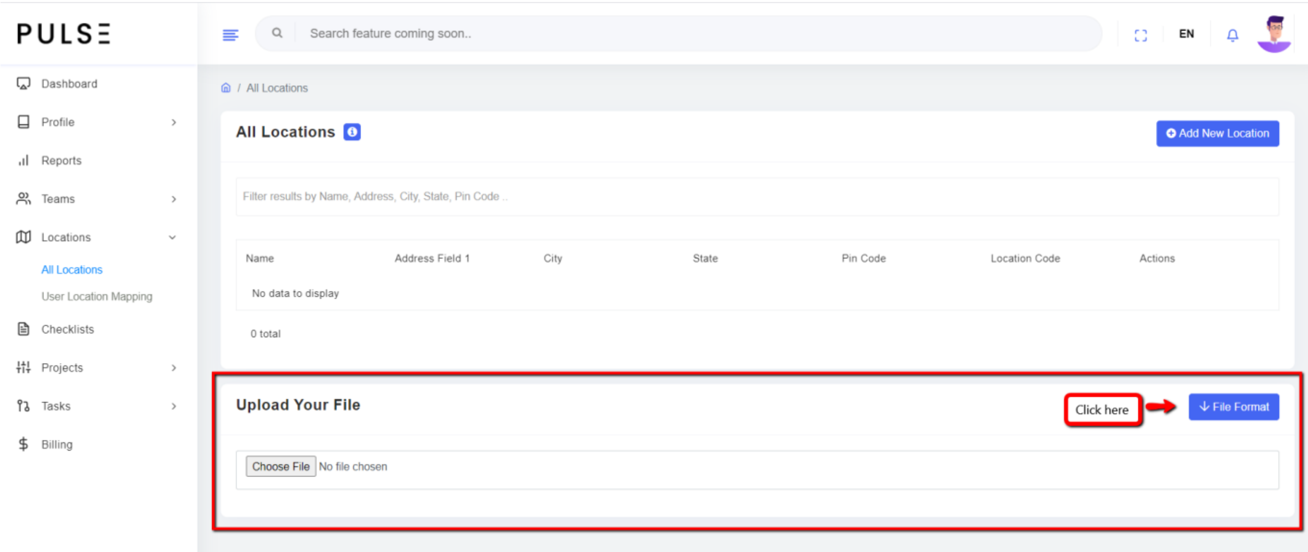
- Latitude and Longitude – The latitude and longitude of the address you had entered will be captured and displayed here.

- Map – The location of your address will be displayed here.

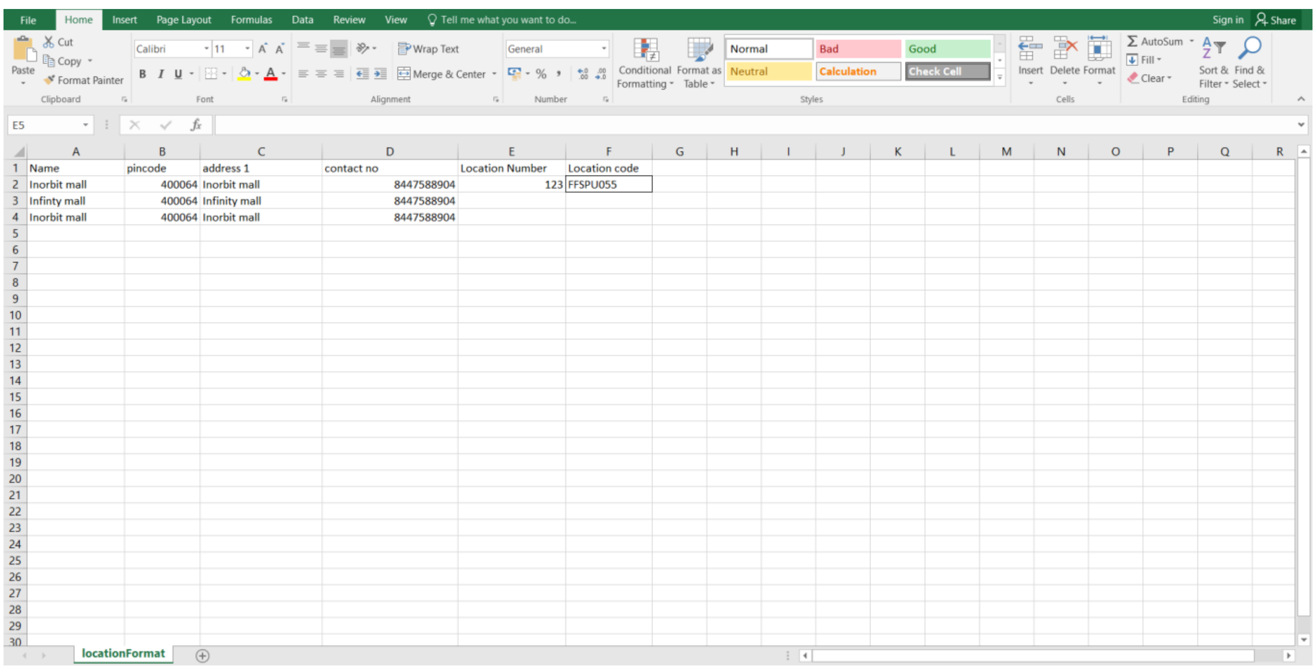
- Click on the Submit button once you have filled all the details to complete adding the location.

6.2 How to add locations in bulk

- To add locations in bulk, navigate to the Upload your file section in the 'All locations page'

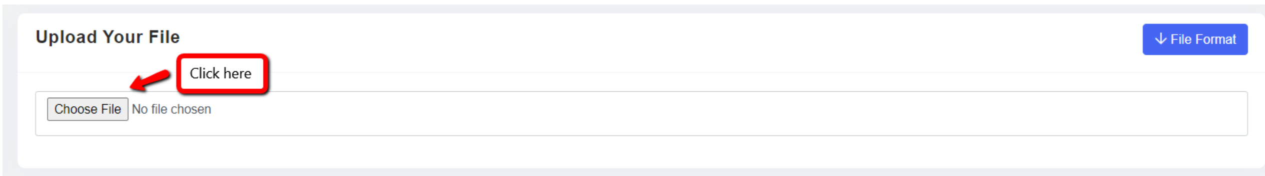


- Over here, click on the File format do download an excel file which has the fields required and a few sample data.

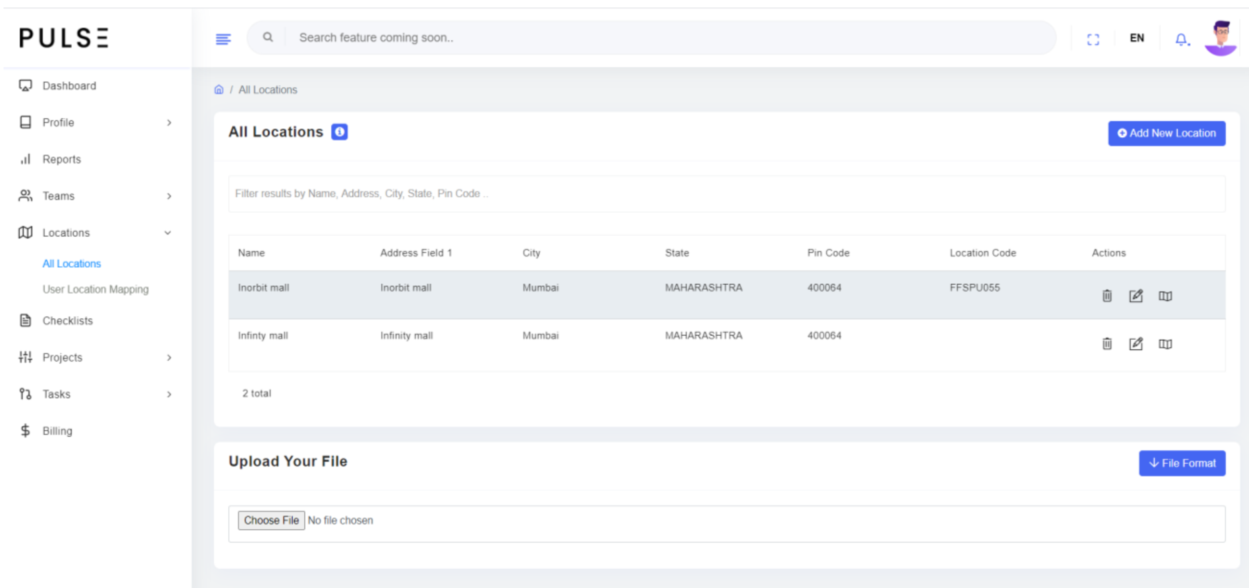


- Erase the data populate the Excel sheet with the name of the location, pin code, address 1, contact no., location number, and location code. Location number and location code are optional fields and you may leave them blank.

- Once you have populated the sheet, upload them to Pulse system by clicking on the upload button.



- If all the mandatory details have been filled successfully, you will see the locations added as a list on the same page.

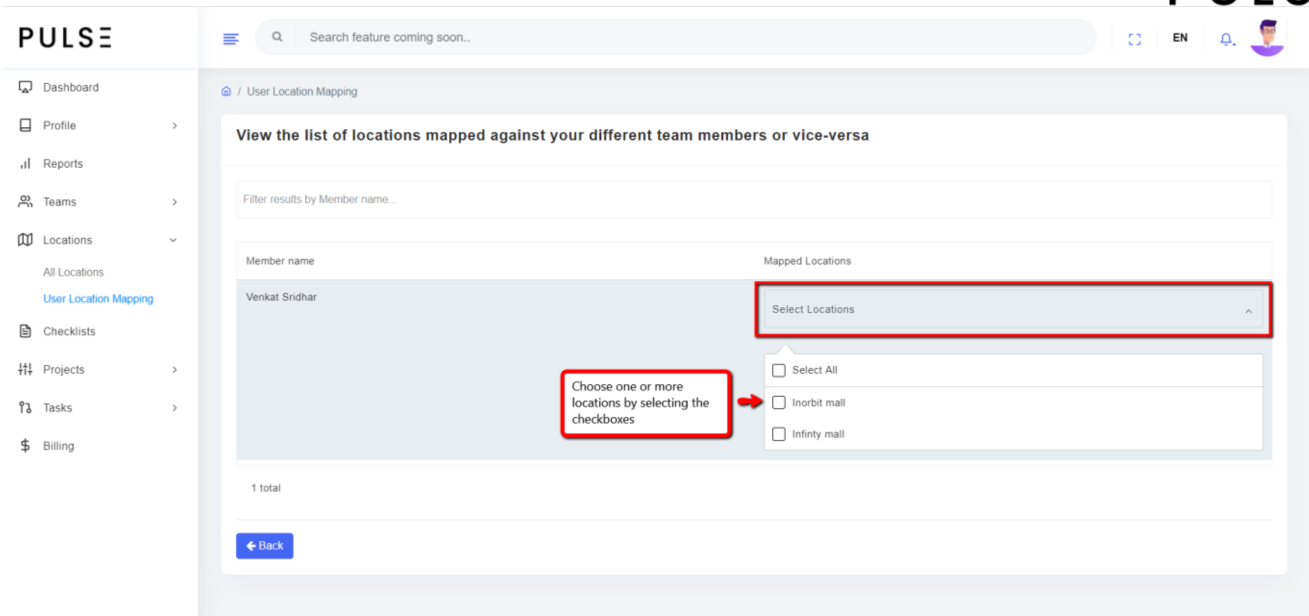


6.3 User Location Mapping

- Once you have added locations, the next step is to add users to an individual location.

- To map a user to a location or vice versa, select the User Location Mapping menu option in the sidebar.

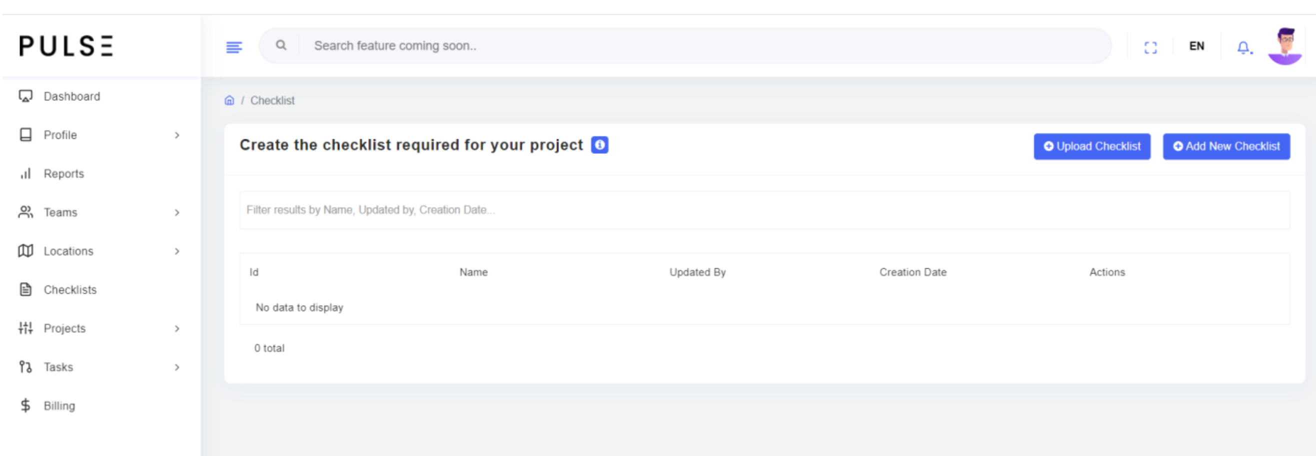
- Once you are there, the list of all the members in your organization will be present. Choose the user you wish to map to a location and click on the corresponding dropdown under mapped locations.



- Choose one or more locations to map the user by selecting the checkboxes.

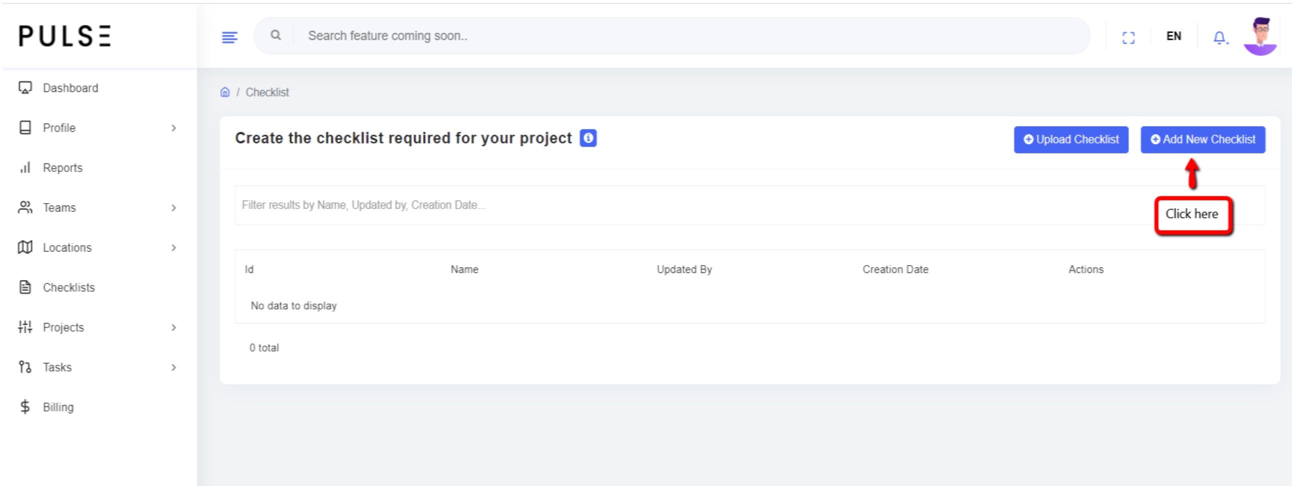
7. Checklists

- Checklists are an integral part of any inspection application and Pulse is no different.
- Checklists are a set of questionnaires that are used by the auditor/inspectors while inspecting a location.
- To create or manage a checklist, navigate to the checklists menu option in the sidebar.
- Once you are at the checklists page, you will be able to view a list of existing checklists created by you. If you are a new user, it will be empty.
- There are two ways to create a checklist, upload a checklist, and create a checklist in the Pulse portal.

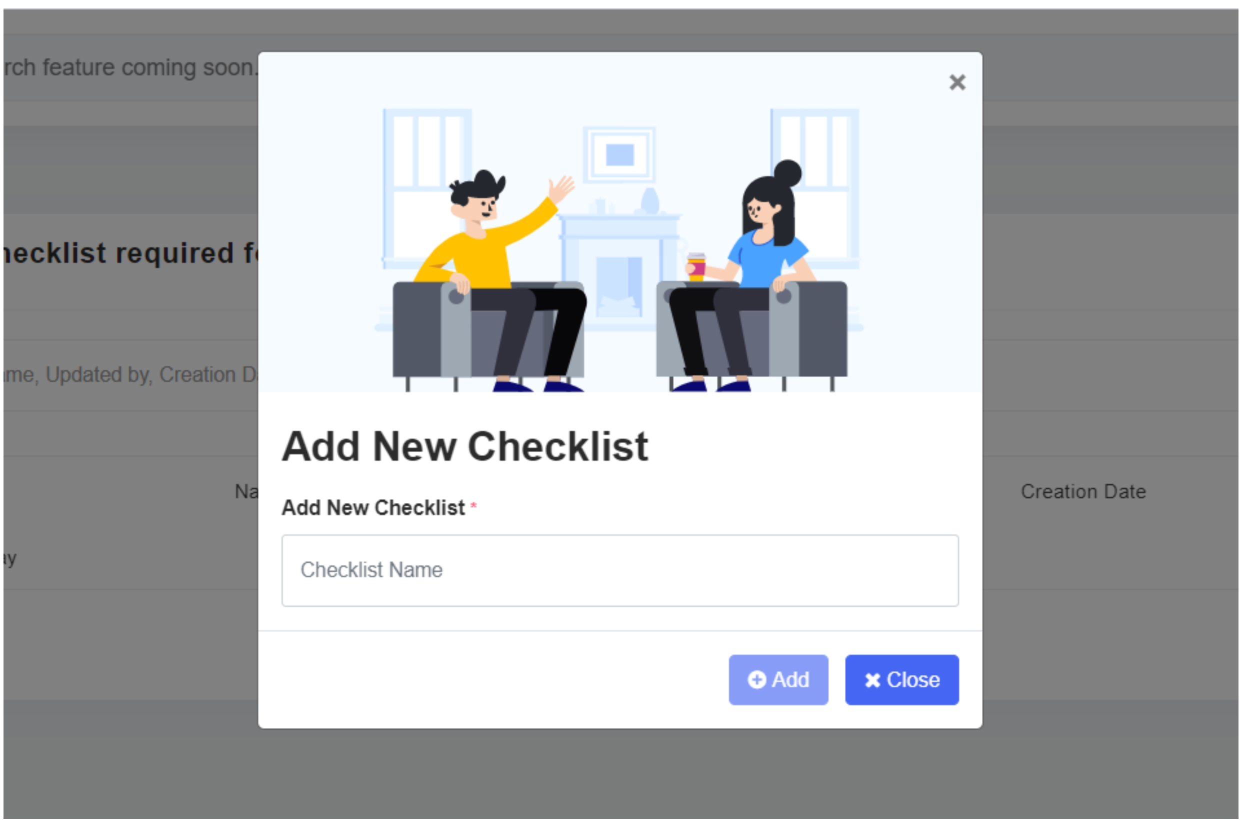


7.1 Add New Checklist

- Click on ‘Add new checklist button’ on the Checklist page



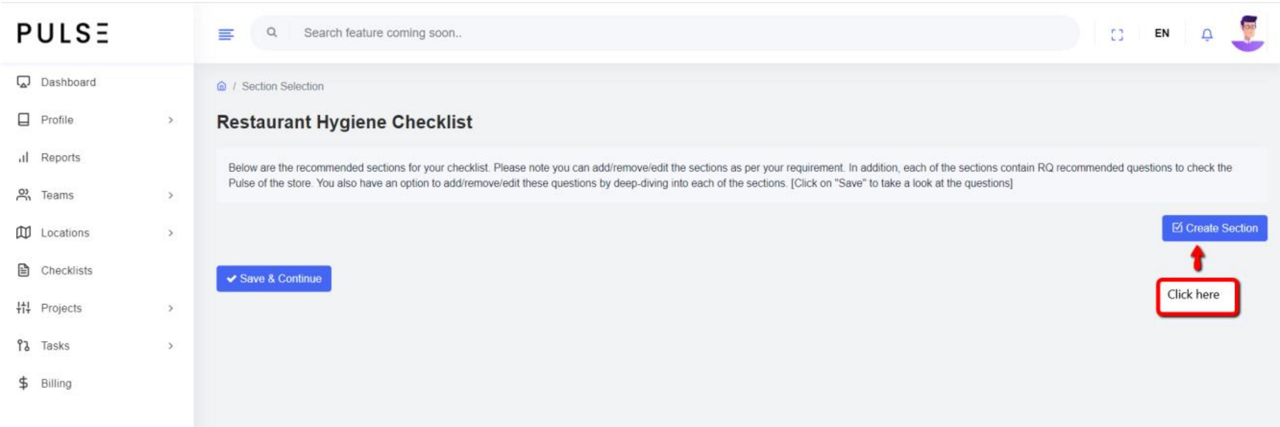
- Add a name to the checklist. For example – Restaurant hygiene inspection



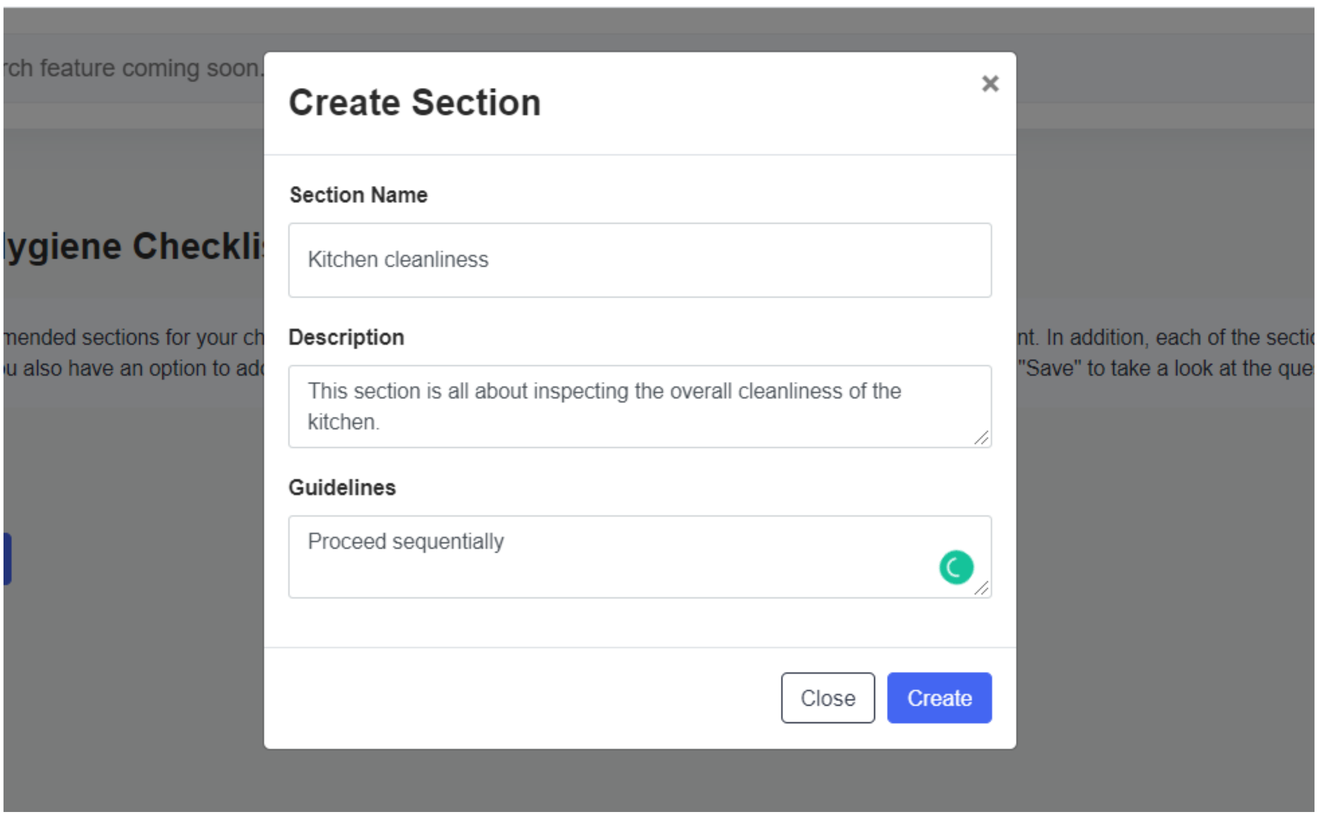
- In the next page, you will get a confirmation that your checklist has been successfully created.

- The next step is to create sections. Sections are separate blocks in your checklist which has a set of questions under it. While generating reports, you can view the section-wise score for an inspection.

- Click on 'Create Section' button to proceed to create a new section in your checklist

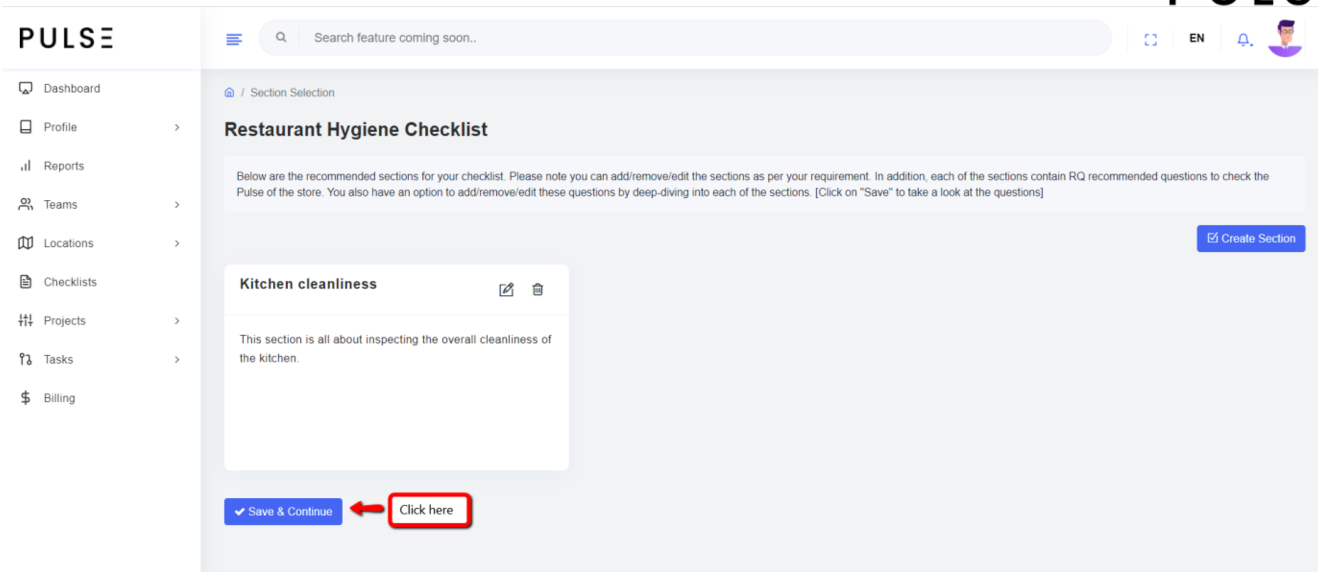


- Add the name of the section, description, and any particular guidelines to follow while the auditor is in the section.

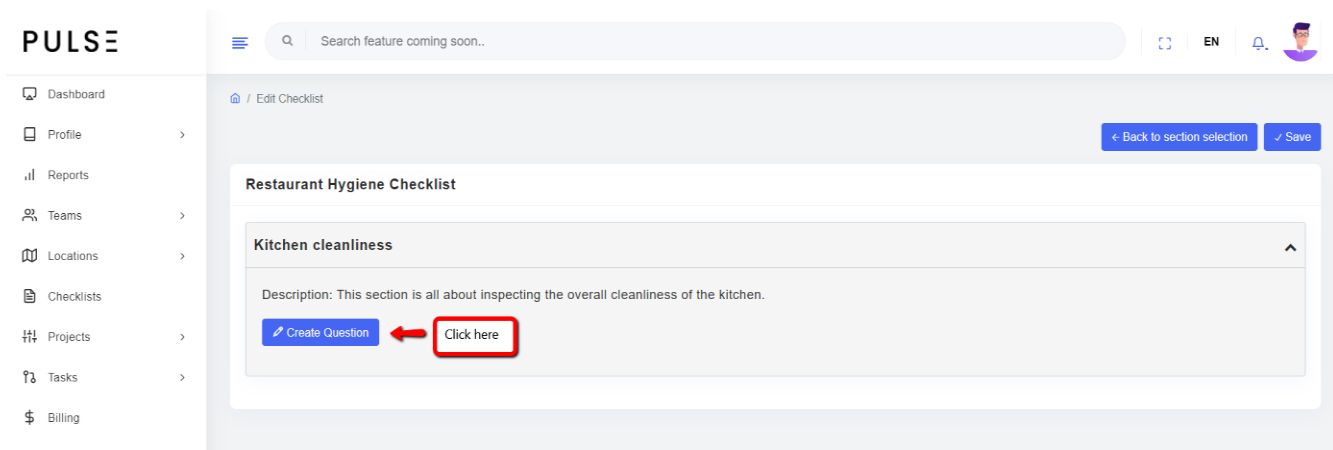


- Click on Create button to successfully create a section.

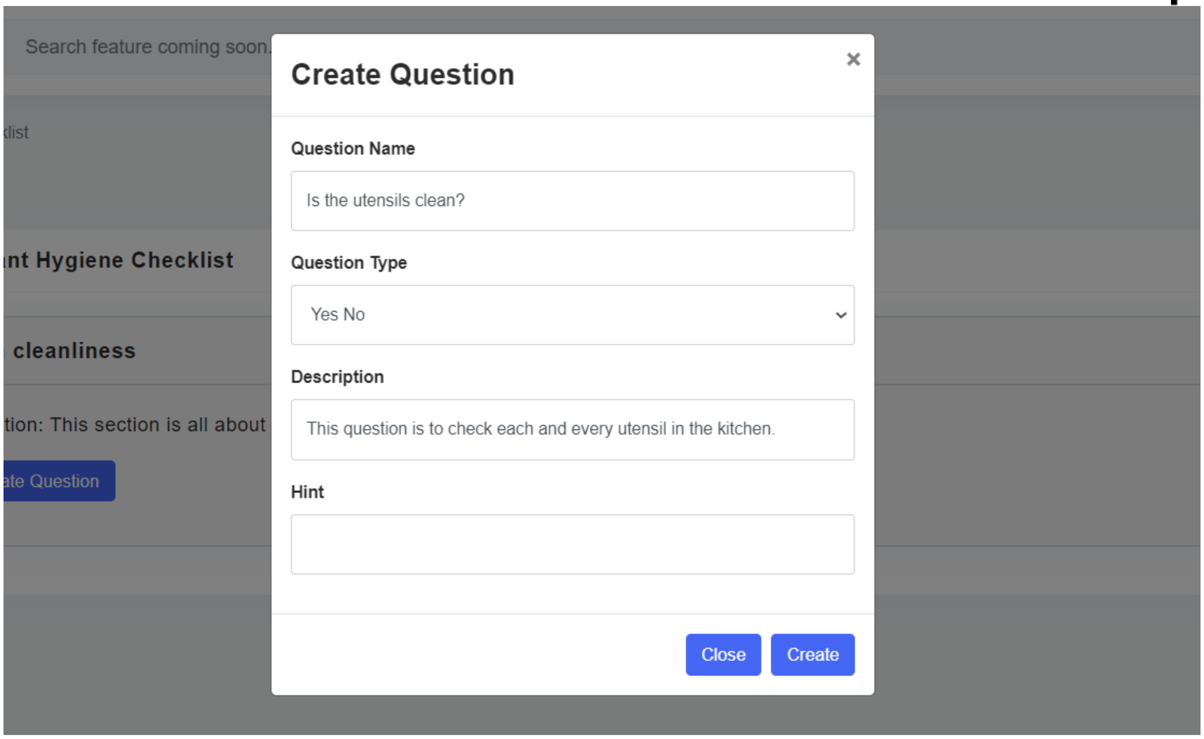
- Once a section is created, the next step is to create the questions. Click on the Save and Continue button to start creating the questions.



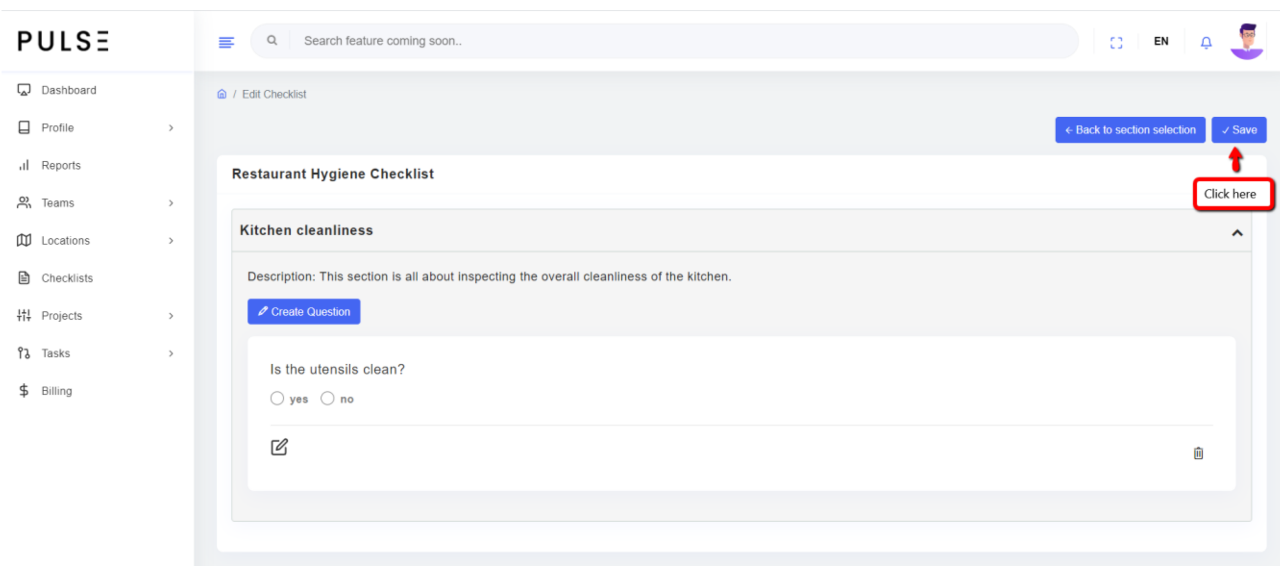
- You will view your created checklist on the next page. Click on the 'Create question' button to create your first question.



- In every question, there will be 4 sections –
  - Name: This is the question that needs to be answered as part of the inspection
  - Question Type: Choose the type of question format. Some of the options include long text, short text, multiple-choice, radio button, etc.
  - Description: An overall description of what this question is all about. This is an optional field.
  - Hint: Any additional guidelines or hints that you wish to convey to the auditor about this question while the inspection is being carried out. This is an optional field.

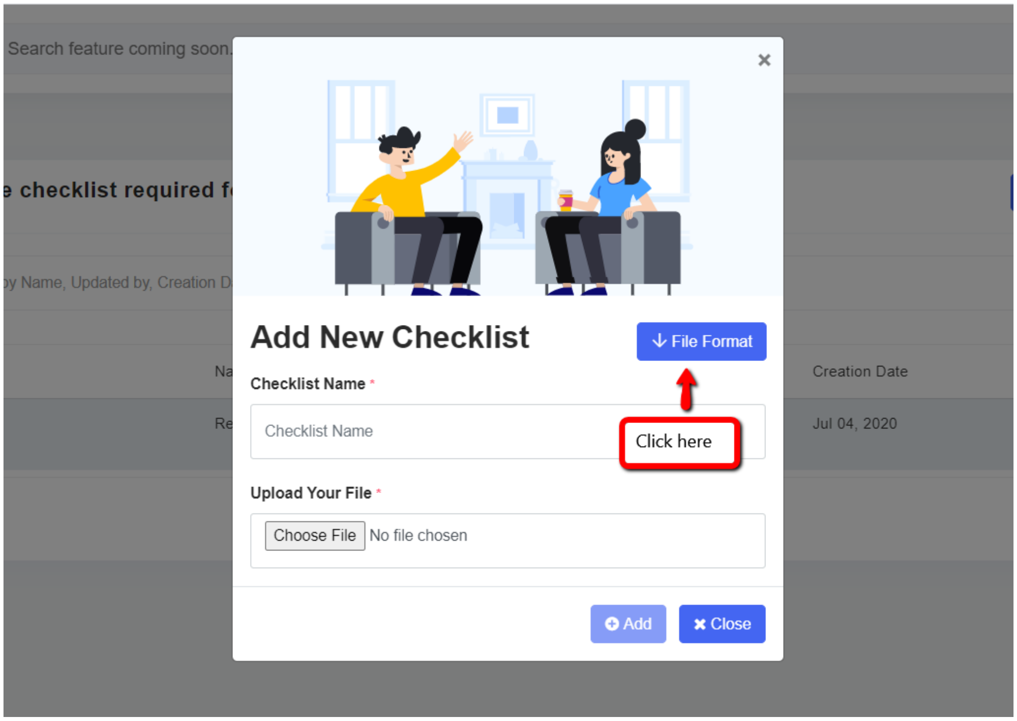


- Click on 'Create' to successfully create the question.
- The created question will be added to the checklist and section once you click on the Save button on the next page.



7.2 Upload checklist

- To upload a checklist, click on the Upload a checklist button on the Checklist's main page. Once done, you will be displayed a popup asking you for the checklist name and a file to upload.



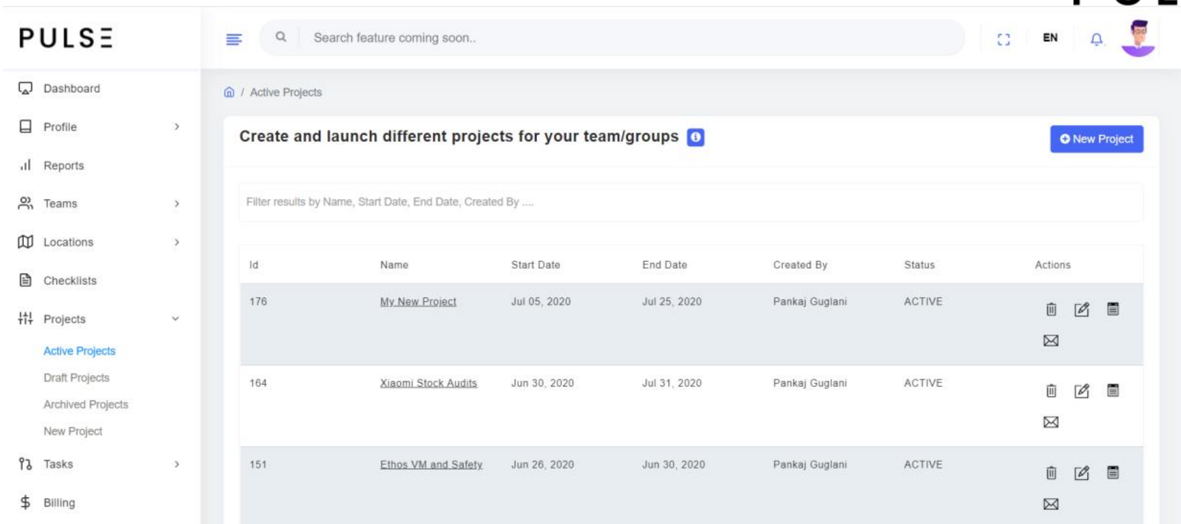
- Click on File Format to download the sample file which will not have any records. Enter the name of the section, the question, and a score that needs to be allotted to that question in the sheet.
- Click on the Add button to successfully upload your checklist into the Pulse portal.

8. Projects

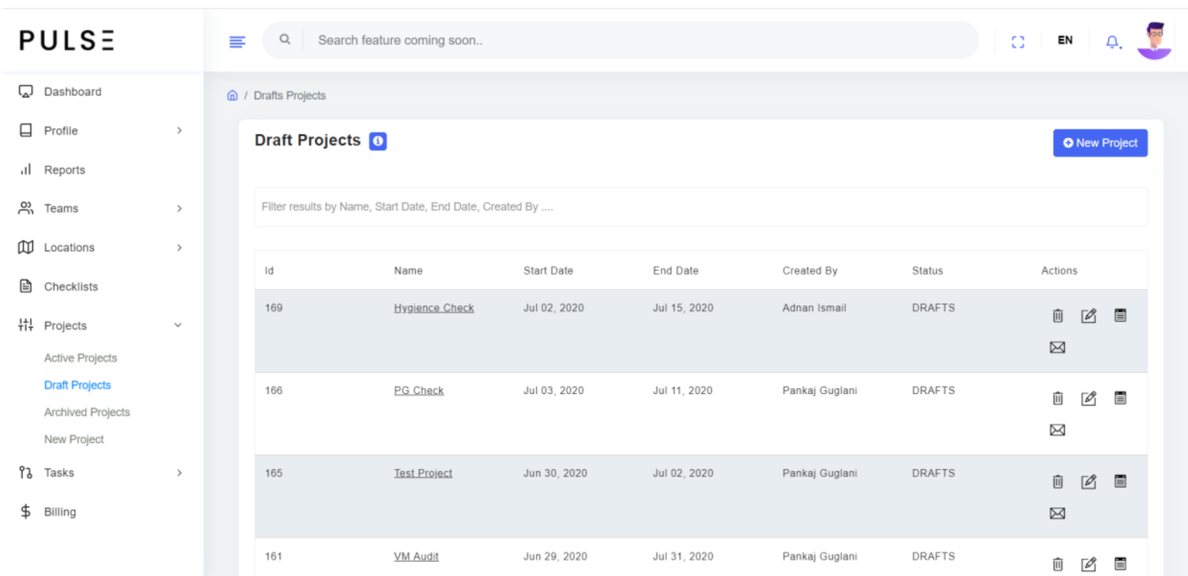
- A project is an actual inspection that you create and assign it to auditors.

- There are 4 sections under Projects –

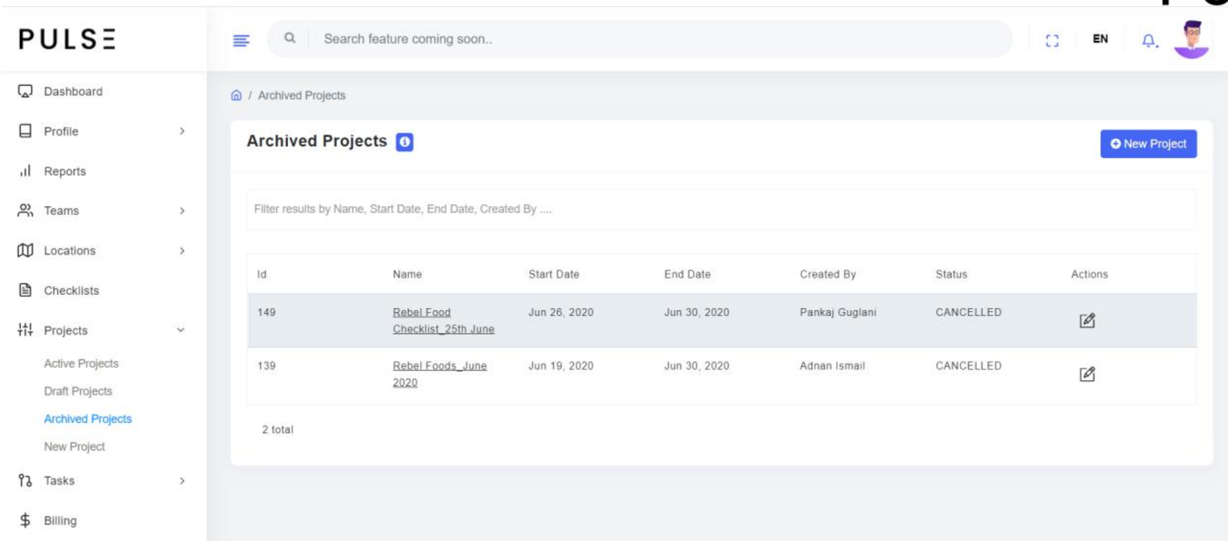
    - Active Projects – This includes all the current projects that are being worked upon and are pending for completion.



- Drafts Projects – This includes all the projects that are currently being created but have not been completely configured.



- Archived Projects – This includes all the projects moved into the archived state.

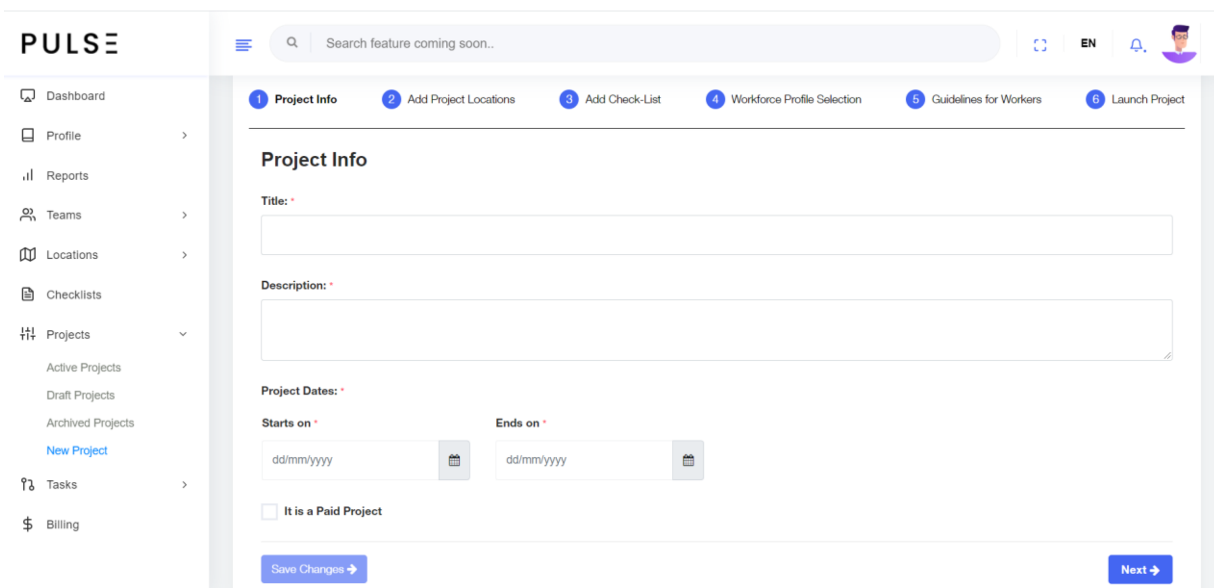


- New Project – This helps you to create a new project. The next section talks in detail about how to create a new project.

8.1 Create a new project

- Navigate to Project > New Project in the sidebar to start creating a new project.
- The first step in the creation of a new project is Project Info.

8.1.1 Step 1: Project Info



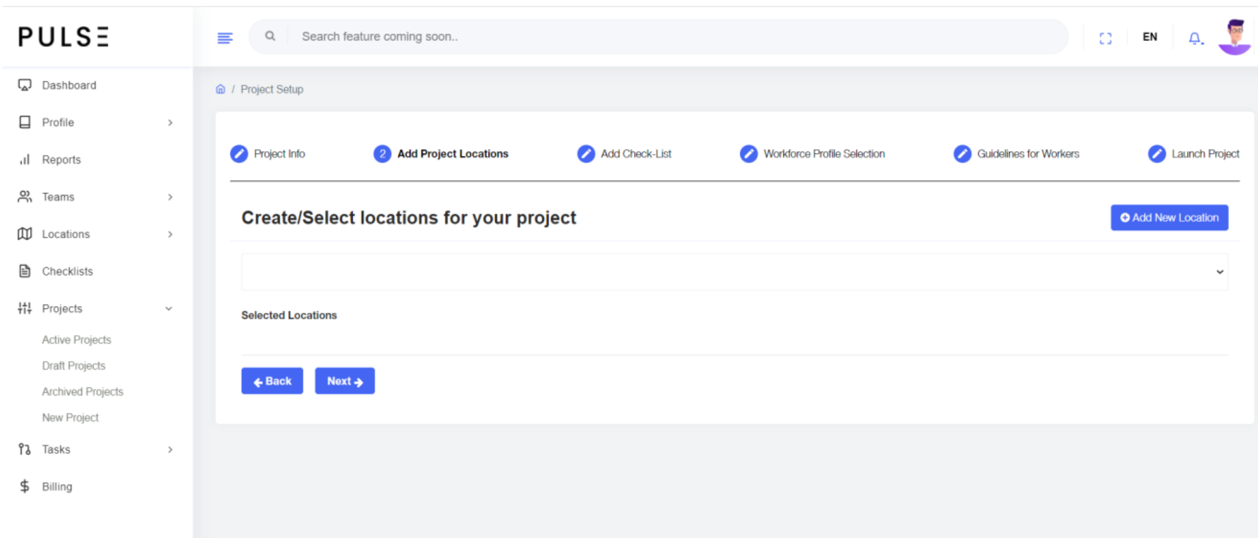
- In this page, the following details need to be added –
  - Title – Add the name of the project
  - Description – Give a brief description of the project
  - Project Dates – Select the start date and end date of the project in the calendar.

- It's a paid project – Select this option if it is a paid project. Useful if the inspection is being conducted by an external agency.

- Paid Project – Once this checkbox is checked, you have two options –
    - Fee – Enter the fixed fee of the project that you intend to pay to conduct the inspection.
    - Reimbursement – Enter the reimbursement amount if it is a paid inspection and you can reimburse a certain amount once the inspection is conducted.

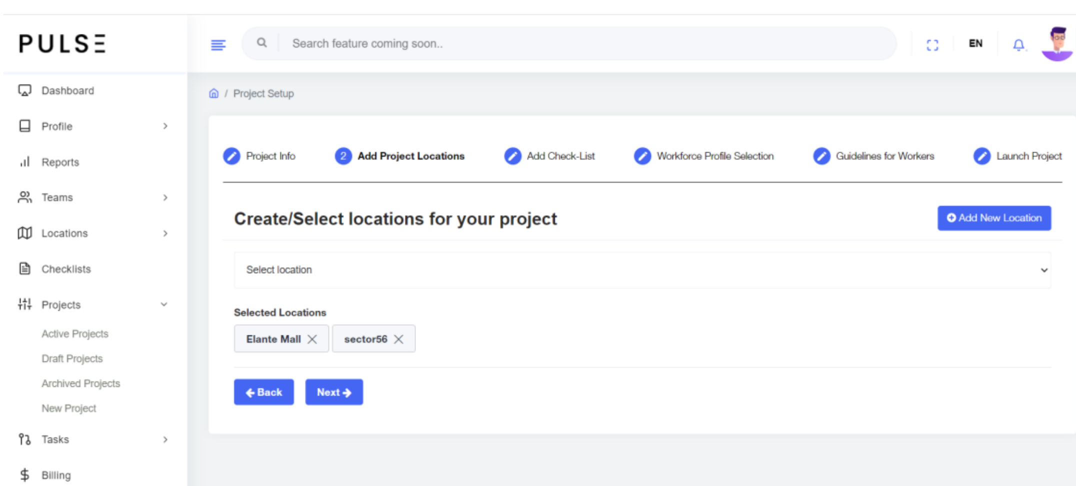
8.1.2 Step 2: Add Project Location

- The next step is to add locations to your project



- Choose a location from an existing list or create a new location. This is the location where your inspection will be carried out.

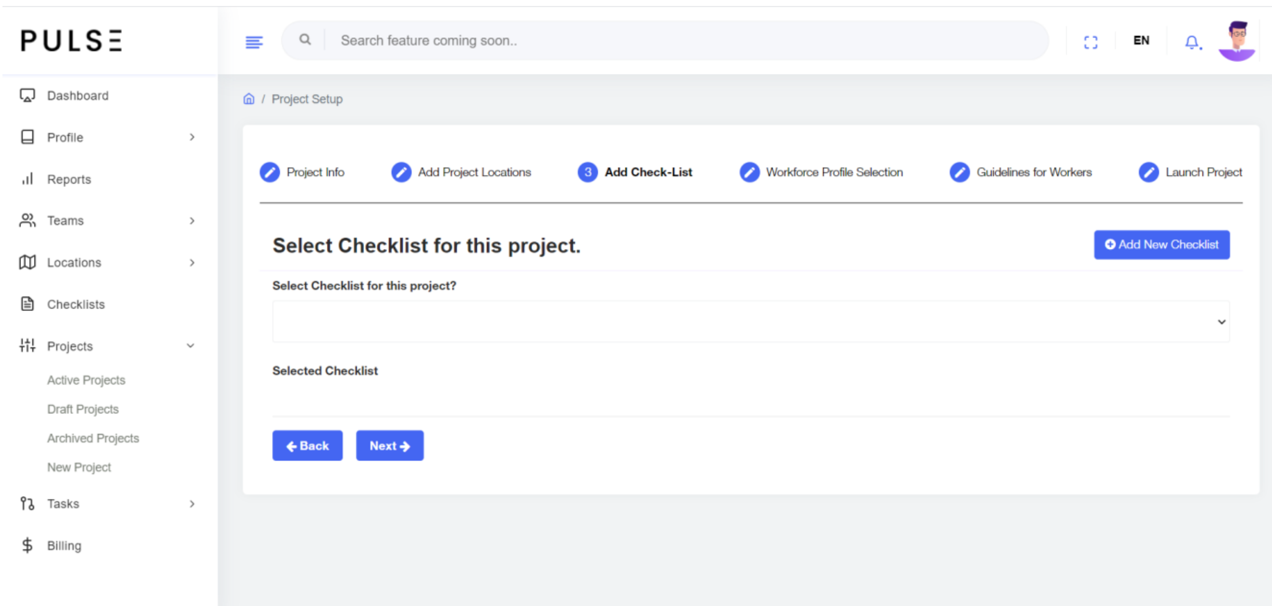
- You can add or more locations to your project by selecting one by one in the dropdown.



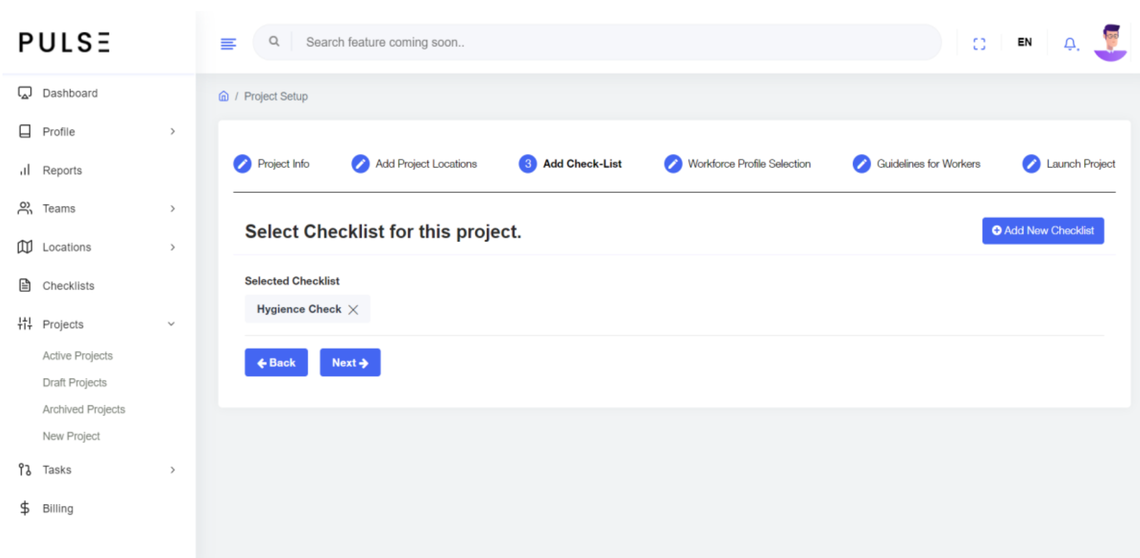
- Click on Next to proceed to the next step

8.1.3 Step 3: Add Checklist

- The next step involves adding a checklist to your project.
- Select a checklist from the dropdown or create a new checklist.



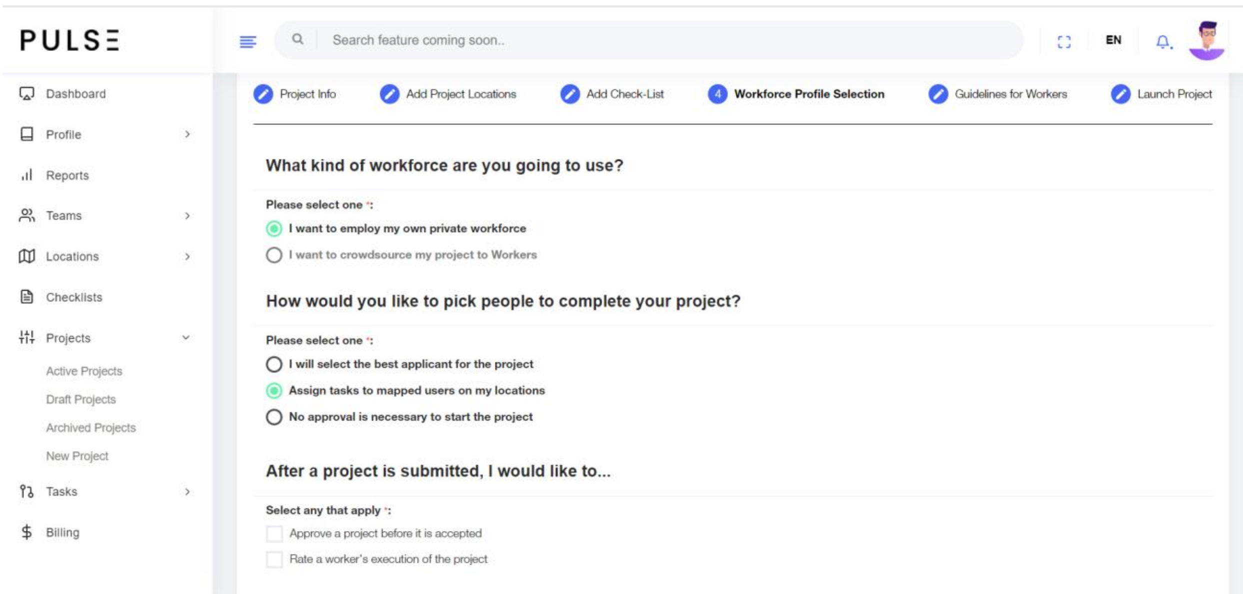
- You can add only one checklist to a project.



- Click on the Next button to move onto the next step.

8.1.4 Step 4: Workforce Profile Selection

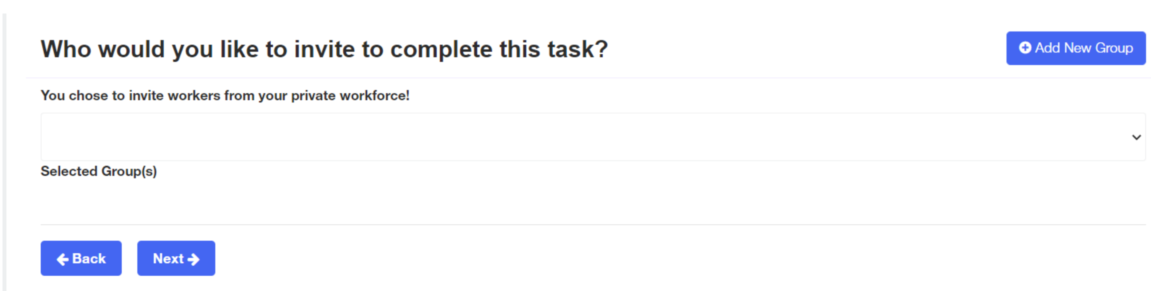
- In this section, you choose who should be a part of the project and how do you intend to choose them.



- You can employ your own private workforce to conduct the inspection or crowdsource the project to a third party.

- If you have chosen to employ your own private workforce, then you have three options –

    - You can choose the best applicant for the project by inviting applicants from the groups of your choice. You can select one or more groups on the same page.



    - Automatically assign the tasks to the users who are mapped to the locations of the project.
    - No approval is needed to join the project and anyone can be a part of it.

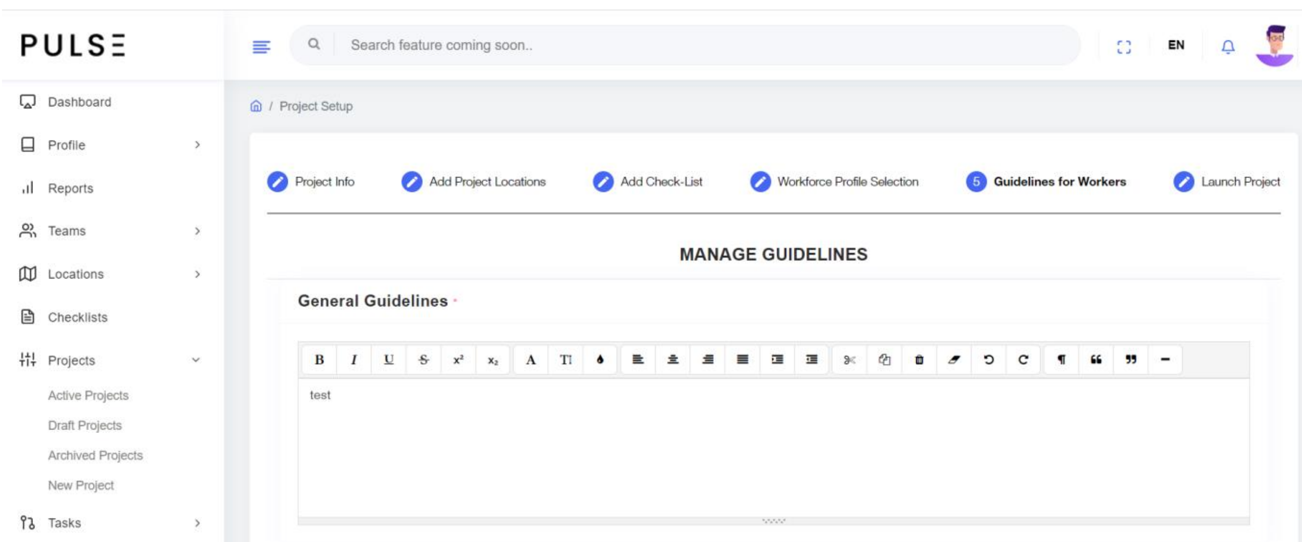
- You also have the option to select what you would like to do after the project is complete. Either you auto-approve the project before it is accepted or you wish to rate how the auditors have performed the inspection to approve it after getting submitted.

8.1.5 Step 5: Guidelines for workers

- In the next step, you have to enter the guidelines to the auditors while they are conducting the inspection.

- There are three sections to it –

    - General Guidelines – This involves any normal guidelines that the auditor should follow before or during conducting the inspection. These guidelines are just for conducting the inspection better and may not be mandatory. For example – Greet the staff at the branch before starting the inspection.
    - Mandatory Scenarios – Specify all the mandatory rules that need to be followed during the inspection. For instance, wear masks compulsorily while conducting hygiene inspection.
    - Mandatory Proofs – Specify the proofs that the auditor has to submit to show that he/she actually conducted the inspection. For instance, get a letter of completion of an inspection signed by the store manager.

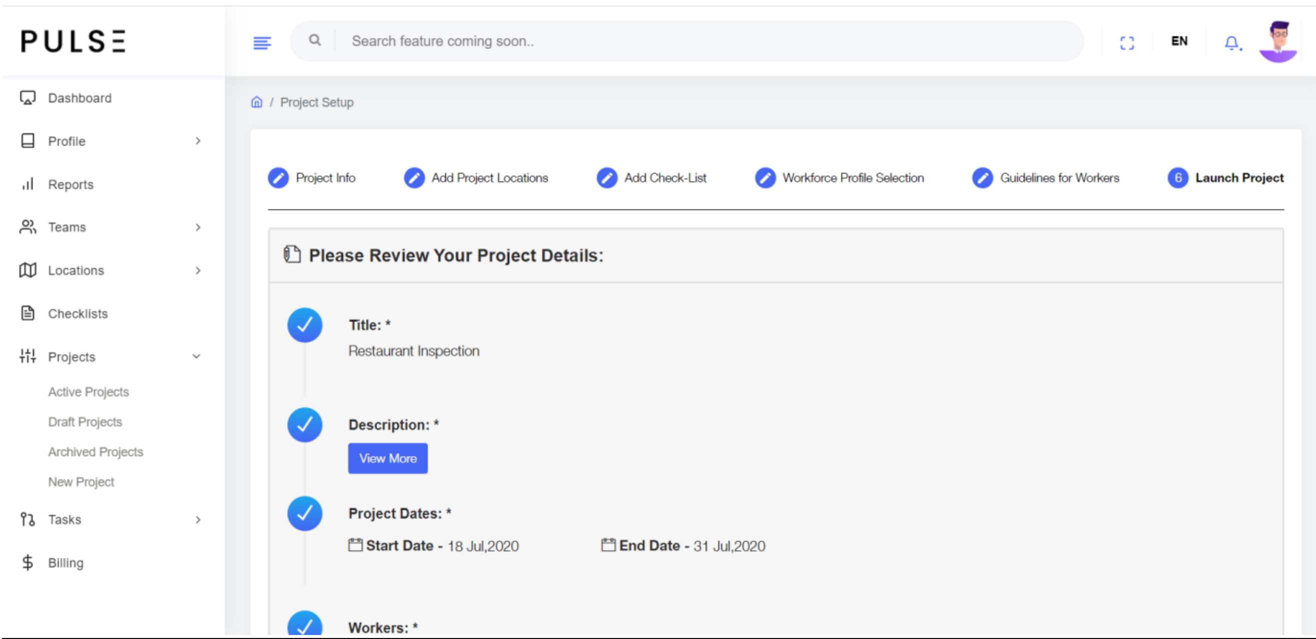


- All the three sections have to be filled mandatorily.

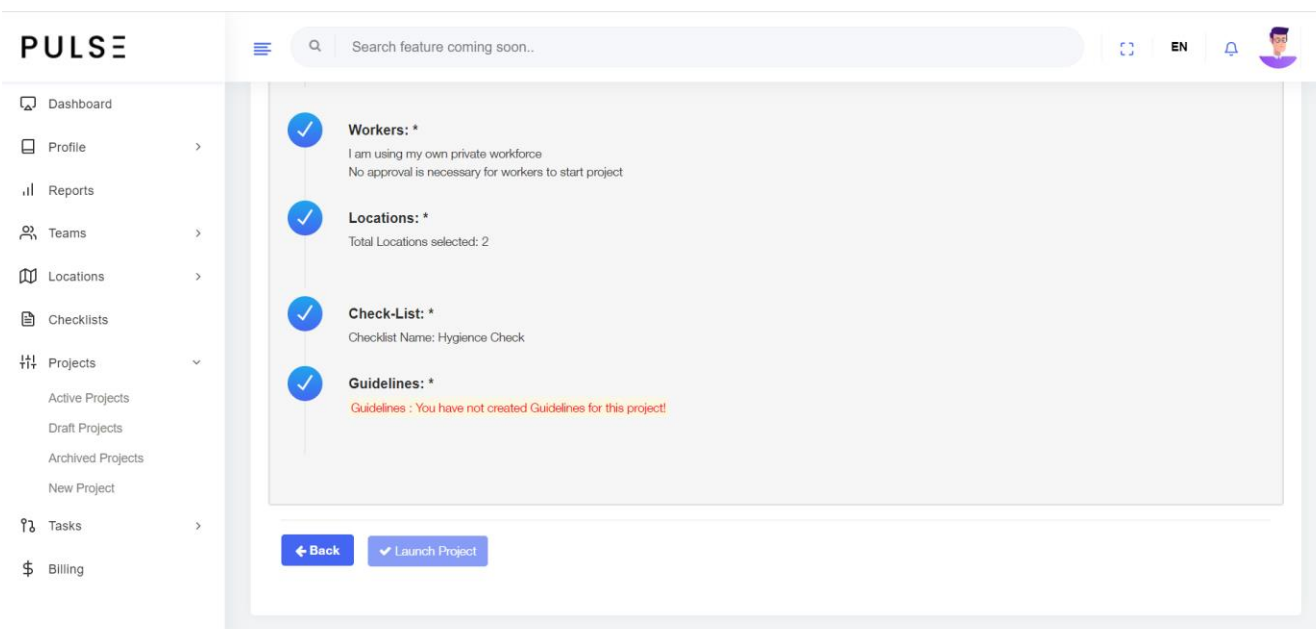
8.1.6 Step 6: Launch Project

- This is the final section in creating your project where you view the summary of all the details you have filled for the project.

- It will specify if you have missed filling any mandatory details in any of the steps.



- Click on Launch Project once you fixed all the issues. Note: The button will be enabled only if there are no errors in your project creation steps.



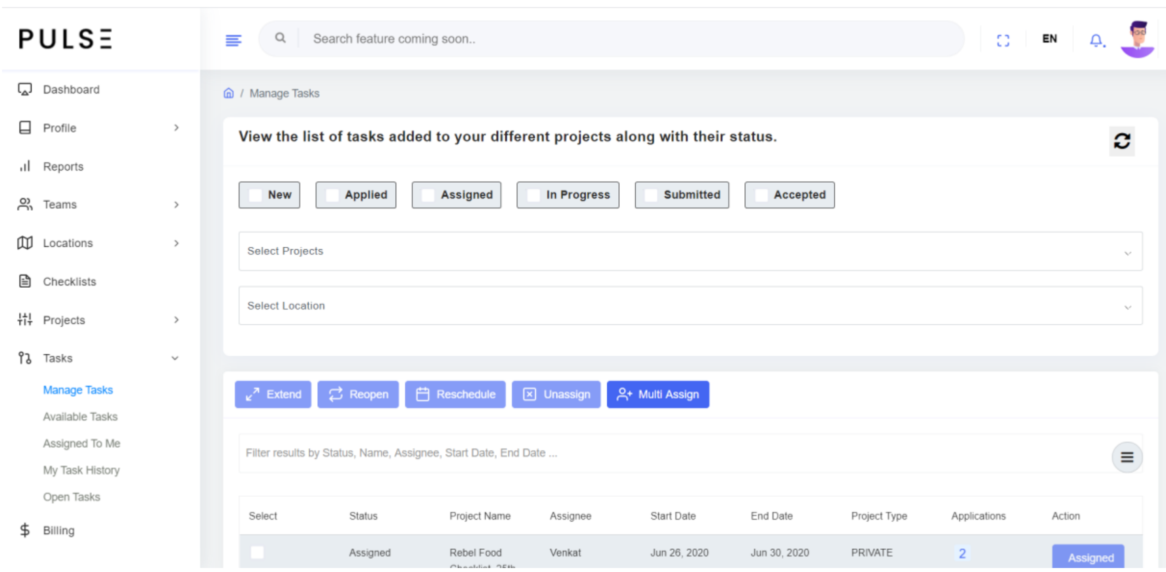
9. Tasks

- Tasks are the executable version of projects. You can assign, pick, and manage tasks in Pulse. There are 5 subsections in tasks.

9.1 Manage Tasks

- To access this section navigate to Tasks > Manage Tasks in the sidebar.

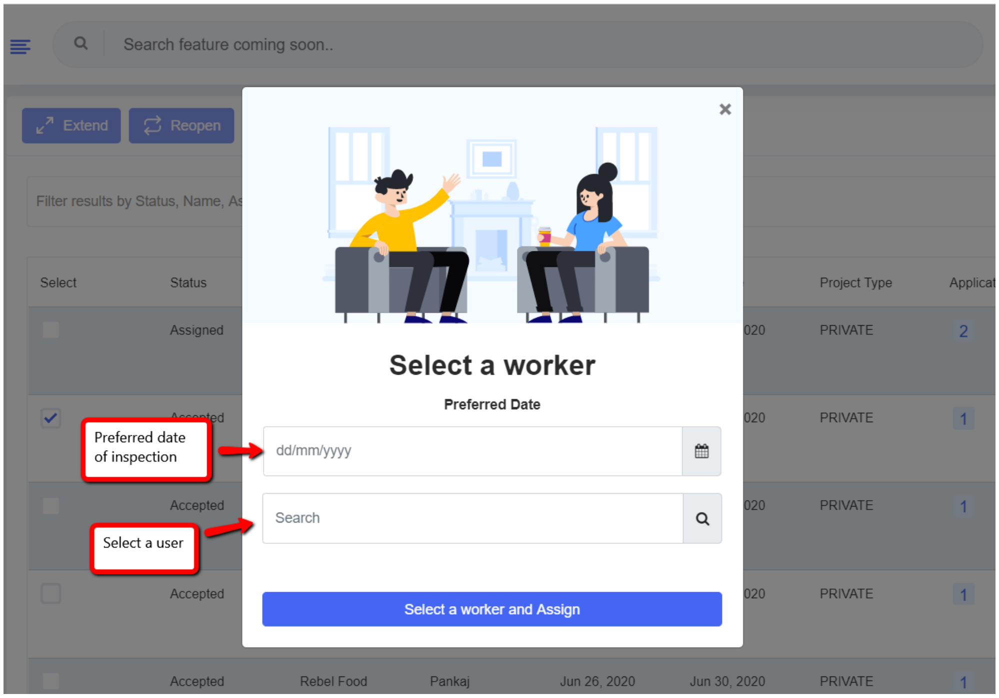
- Manage tasks lets you to view the list of tasks added to your different projects along with their status.



- You have an option to filter the tasks based on their status, projects and location.

- To assign a task to a user, select a task from the list by checking the checkbox against it, and click on Multi-Assign button.

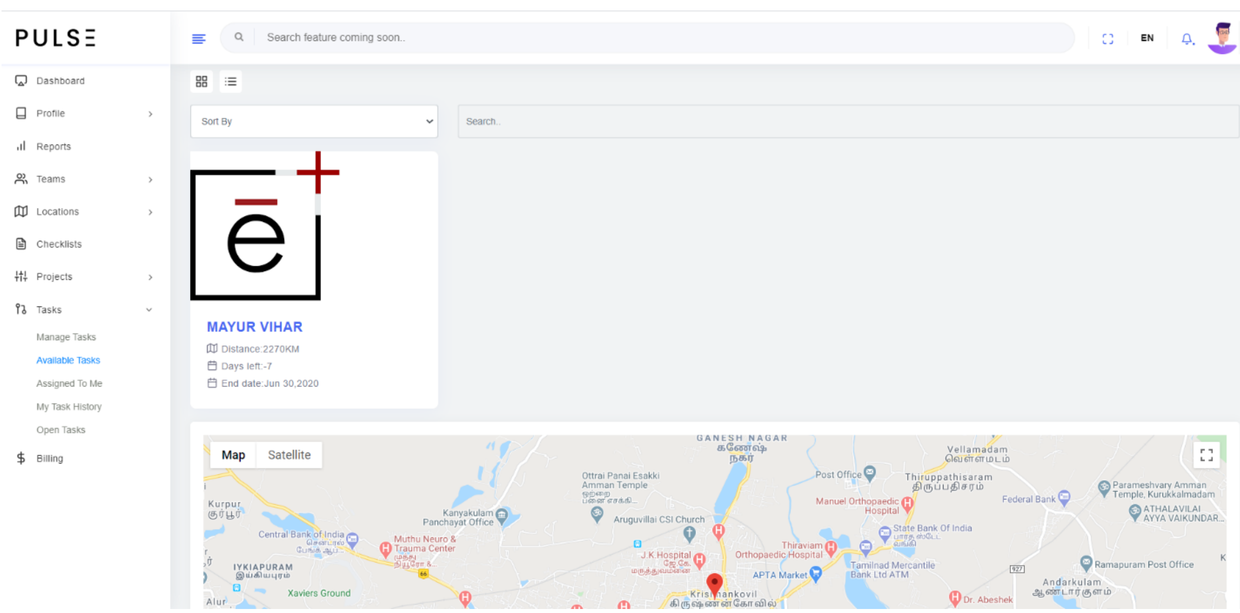
- You can choose one or more users from the list to assign the respective task. The number of applications will increase by 1.



- To unassign the task, check the box again against a task and click on the unassign button.
- You can also reschedule a task by checking the checkbox and clicking on the reschedule button.

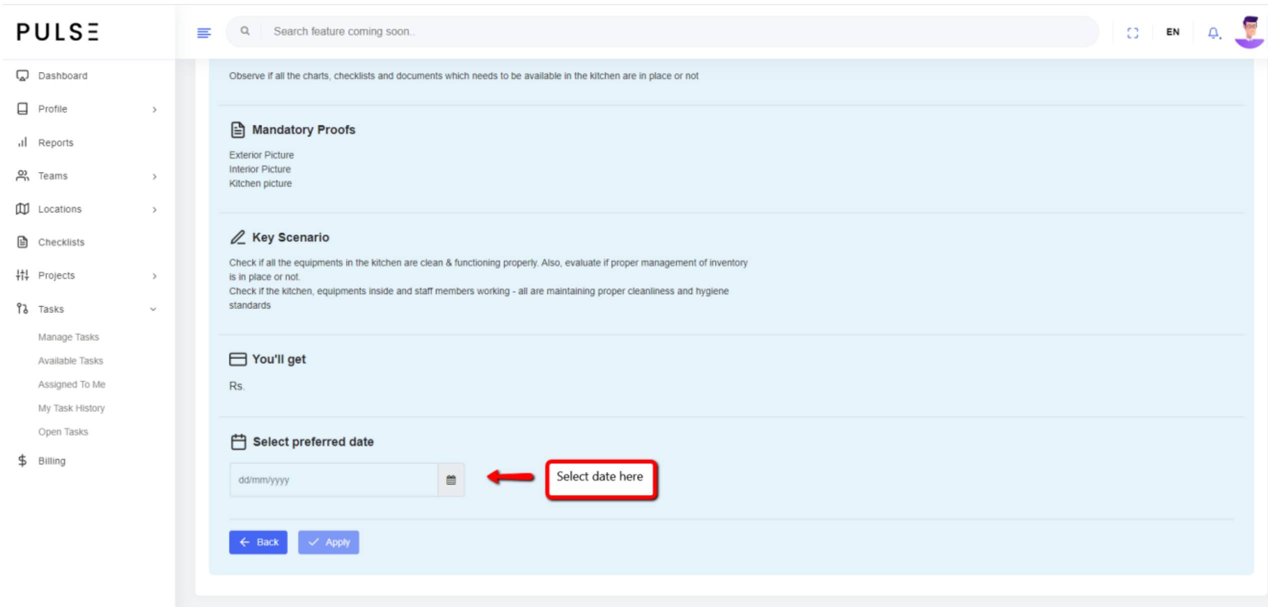
9.2 Available Tasks

- This will list down all the tasks that available for you to pick based on how close it is to your current location.



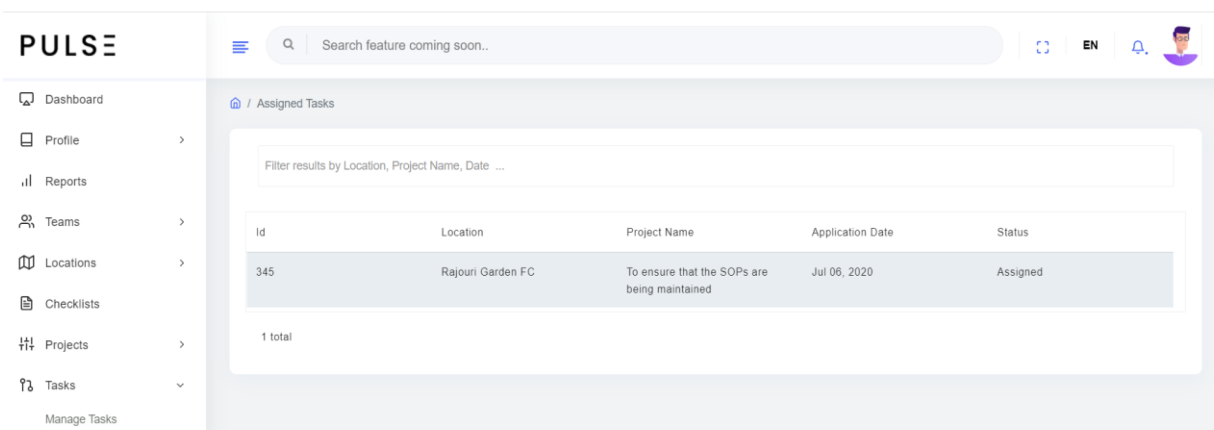
- Click on the task to see the details.

- Enter your preferred date to undertake the task and click on Apply to apply for the task.



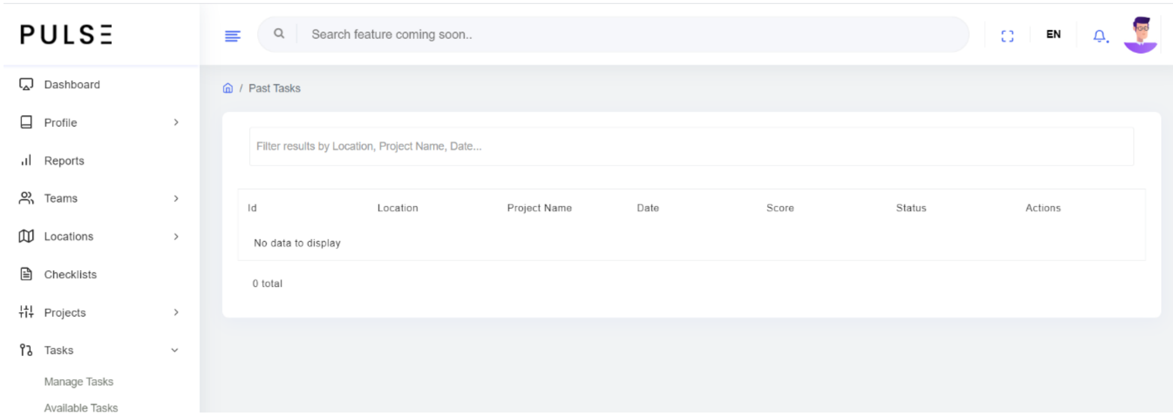
9.3 Tasks assigned to me

- Displays a list of all the tasks assigned to the current logged in user
- To access this section navigate to Tasks > Tasks assigned to me



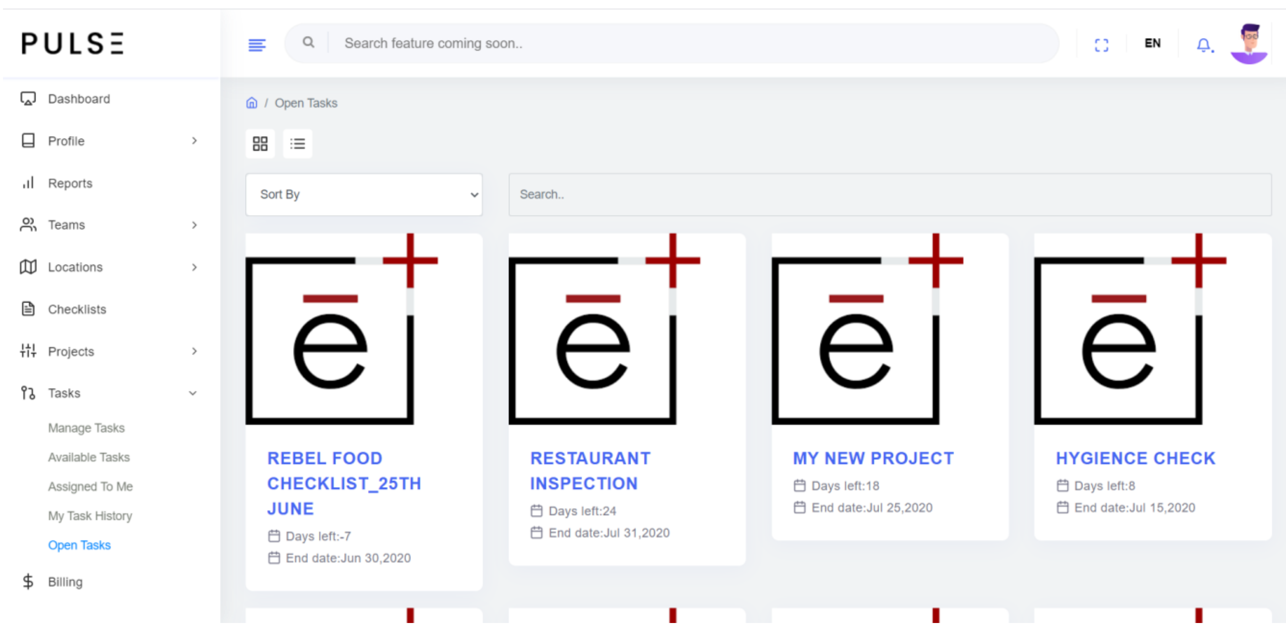
9.4 My Task History

- This section displays all the tasks that were assigned to you and actioned upon by you.
- To access this section navigate to Tasks > My task history



9.5 Open Tasks

- This section displays all the tasks that are open currently.
- To access this section navigate to Tasks > Open Tasks.

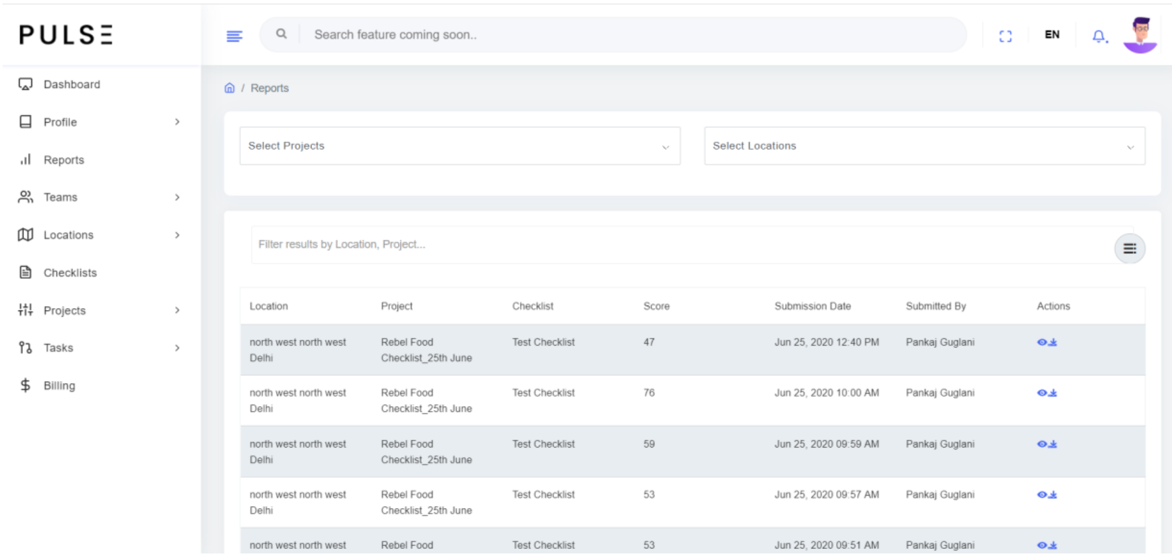


- Click on a task to see the details about the project.

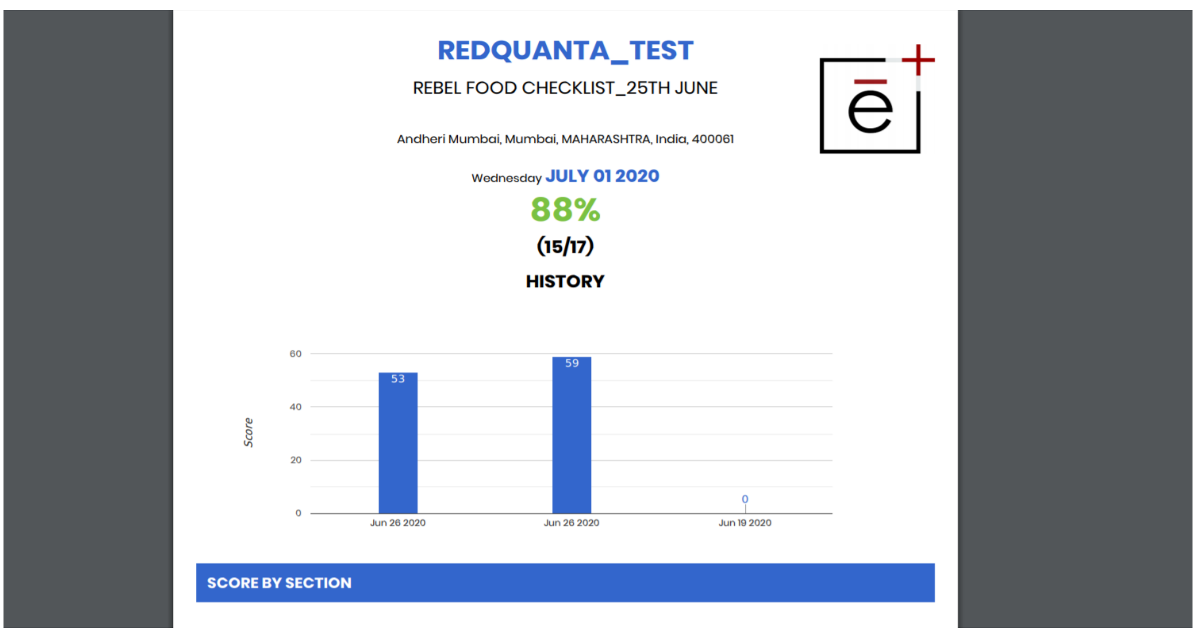
10. Reports

- This section lets you view and download reports of various completed projects that have been segregated based on the locations of the project.

- To access reports, navigate to Reports in the sidebar.
- In the reports page, you have an option to filter the reports based on the project or based on the location. You can also search for a report in the search bar.



- You have an option to view or download the report by clicking the respective option under the actions column.



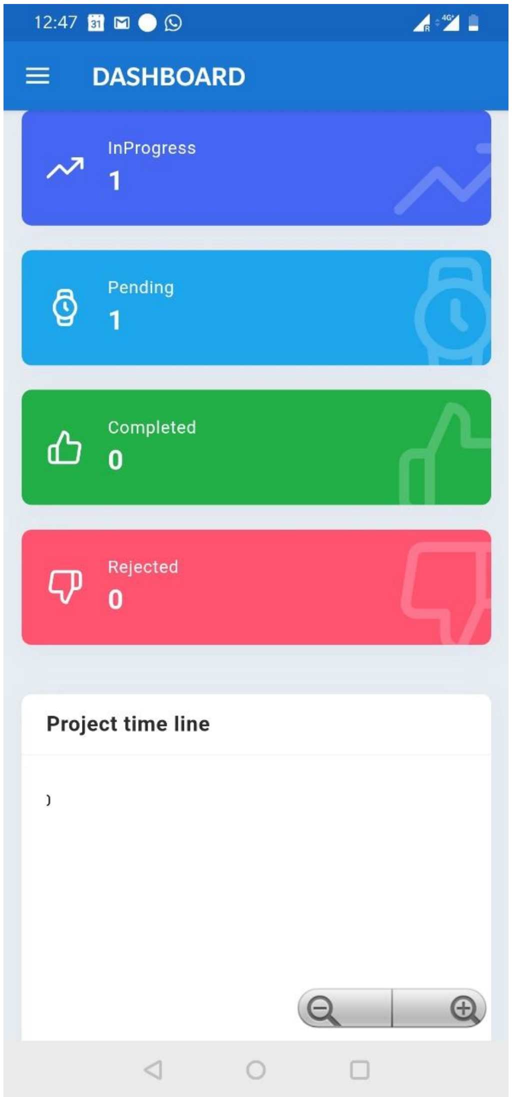
11. How to perform a task

- An auditor and inspector can download the application of Pulse in the Google Play Store. The link for the same is –

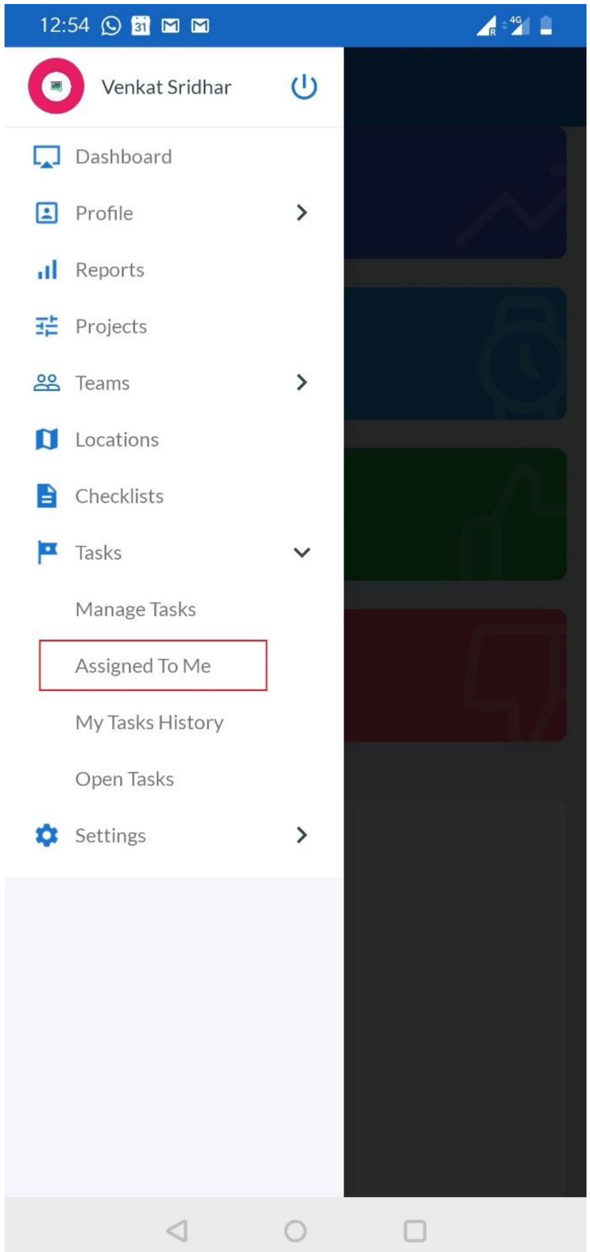
  https://play.google.com/store/apps/details?id=com.innovative.pulsepro

- Once the app is downloaded and installed, log in with your credentials.

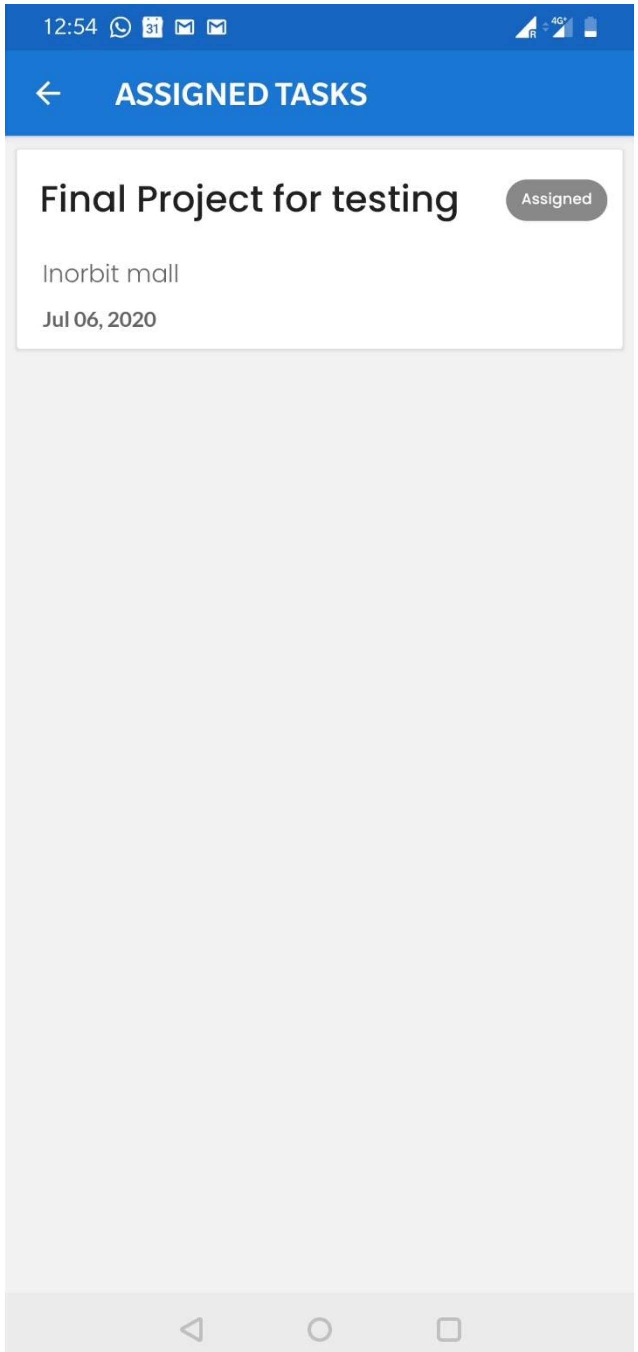
- Once logged in, you will be displayed a dashboard that displays all the task details pertaining to your account.



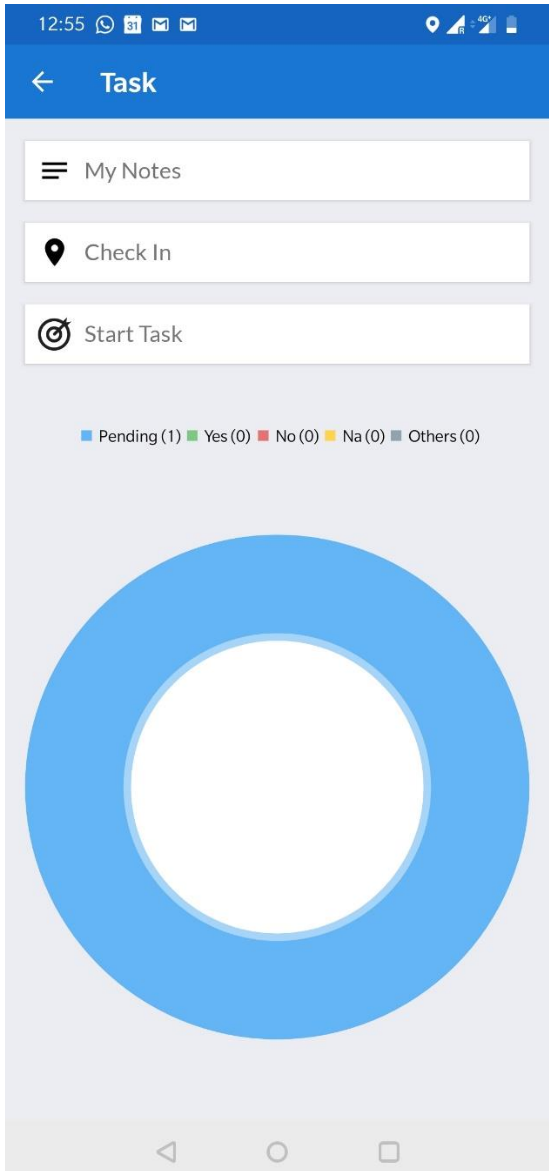
- Click on the hamburger menu and select ‘Assigned to me’ to view your task.



- You will be displayed the tasks assigned to you.

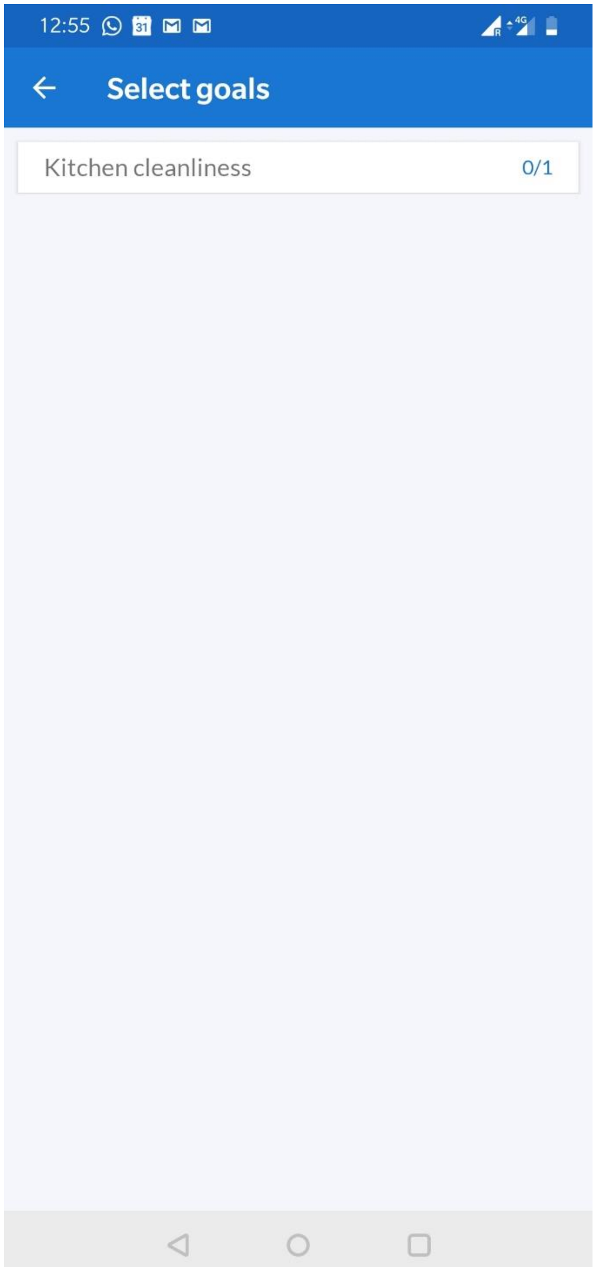


- Click on the task to view its details



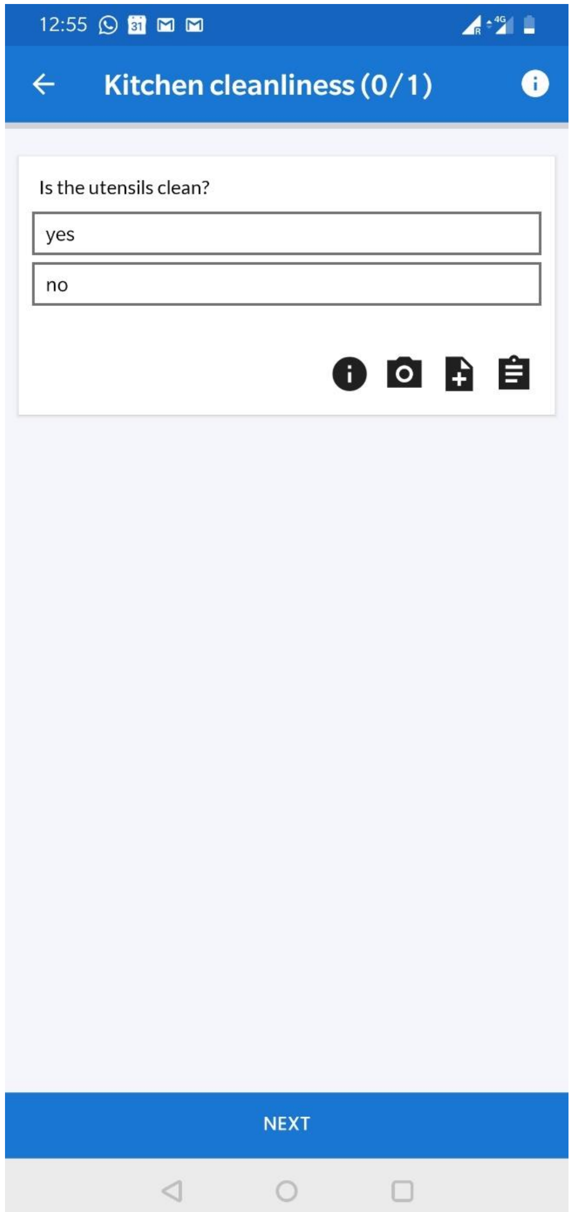
- The My Notes section helps you to add any relevant notes to your task.
- Check-in function helps you to check in to the current location based on your GPS.
- Clicking on the Start task will begin the task for you.

- Once you click on Start Task, you will be displayed the checklist associated with the task.



- Click on the checklist to view the questions under it.

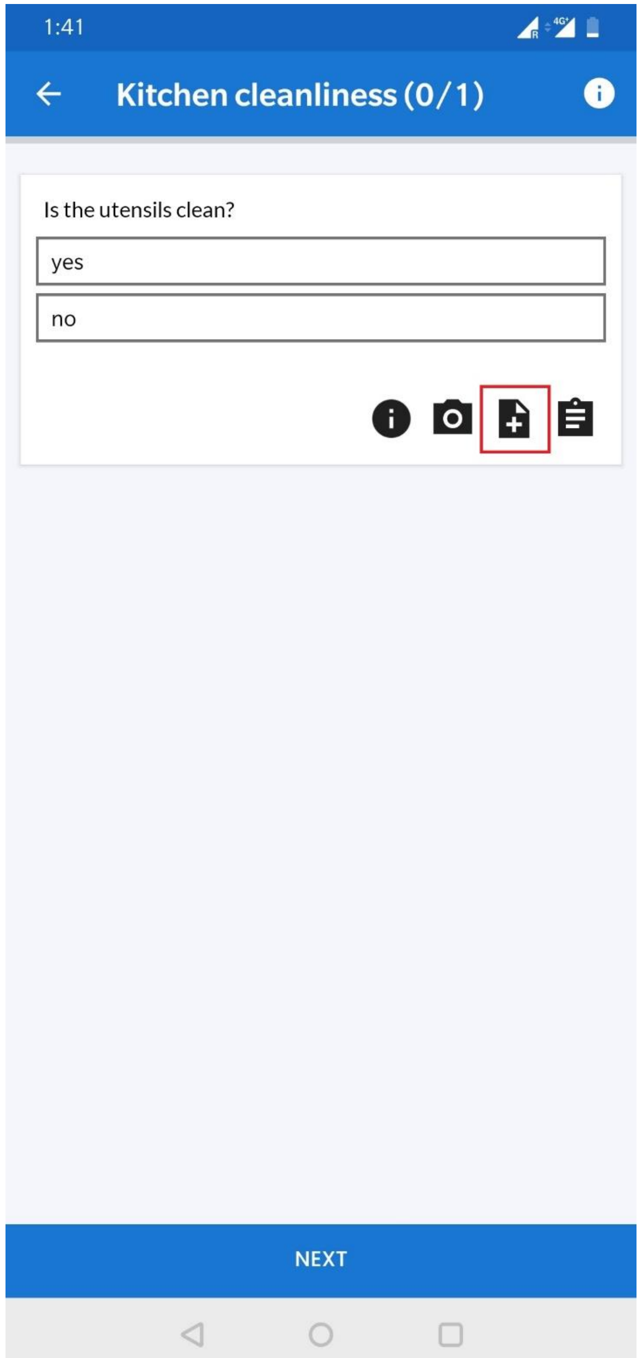
- You will view the list of questions along with a way to answer them.



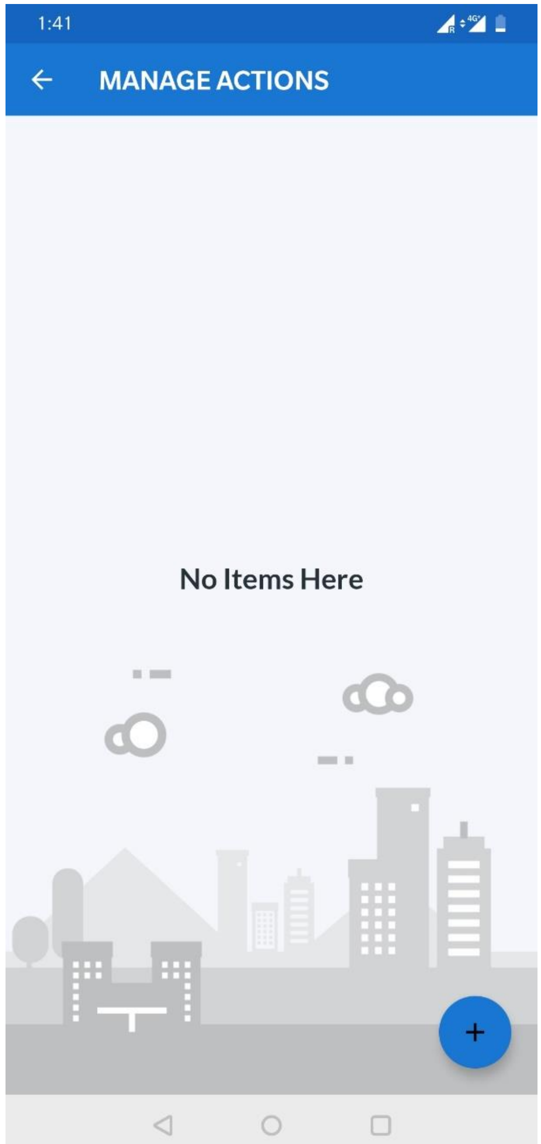
- Additionally while answering you will also be able to perform the following tasks –

    - View additional information about the question
    - Attach an image from the camera or your gallery
    - Assign an action to this question.
    - Add a comment.

- To assign an action to the question, click on the action button against a question.



- Click on the + button to add a new action.



- Enter the title, description, priority, deadline, and the status of the action.