



# Enterprise

## Data Sync Reference Guide

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**PULSE®**

## Enterprise Access

Access to the Enterprise Dashboard is dependent on a user's role. There are two levels that users can be assigned from within pulse:

1. Site Accessibility and Billables Management
2. Site Accessibility Only



*The Enterprise user role cannot be used as a stand-alone and must be used in conjunction with another role.*

## Site Access & Billables Management

If the Enterprise role is assigned in conjunction with the business manager, business owner, or billable items manager, the user will have full access to the:

- Enterprise Dashboard
- Individual Pulse sites and their Billable Items

Role(s) \* Business Manager

Is Provider  Enterprise

Pin  Billable Items Manager

State License Number  Groomer

National License Number  Guest

Employee Number  Inventory Manager

Practice Management

Search Options

Segment: \_\_\_\_\_ City: \_\_\_\_\_

Name: \_\_\_\_\_ State: \_\_\_\_\_

Id: \_\_\_\_\_ Server: \_\_\_\_\_

Id	Server	Name	Segment	Created	City	State
326	SE1	Covetrus eVet Equine Training	Equine	9/14/2015	Madison	GA
238	SE1	Training - Covetrus	Alvyn	4/13/2015	Vladisville	

Selective Sync - [Create a Selective Sync](#)

Date	Employee	Selective Sync Summary
5/20/2024 9:26:35 PM	BH EntTest	1 Practices   1 Billable Items   1 Fields
5/20/2024 8:02:48 PM	BH EntTest	1 Practices   1 Billable Items   1 Fields
5/20/2024 8:00:46 PM	BH EntTest	1 Practices   1 Billable Items   1 Fields
5/20/2024 7:46:52 PM	BH EntTest	1 Practices   1 Billable Items   1 Fields
5/20/2024 7:40:12 PM	BH EntTest	1 Practices   1 Billable Items   1 Fields
5/20/2024 7:38:33 PM	BH EntTest	1 Practices   1 Billable Items   1 Fields
5/20/2024 6:59:51 PM	BH EntTest	1 Practices   1 Billable Items   1 Fields
5/20/2024 6:54:33 PM	BH EntTest	1 Practices   1 Billable Items   1 Fields
5/20/2024 6:47:05 PM	BH EntTest	1 Practices   1 Billable Items   1 Fields
5/20/2024 6:40:20 PM	BH EntTest	1 Practices   1 Billable Items   1 Fields

1 2 3 4 5 NEXT

Segments - [Add a New Segment](#)

Edit	Name	Practices	Active	Delete
	Alvyn	1		
	Equine	1		
	Small Animal	0		

## Site Access Only

The Enterprise role can also be combined with the Receptionist role.

- Users with this access will only be limited to the Practice Management section on the Enterprise Dashboard.
- They can search for and access Pulse sites, view and manage appointment calendars, and run assigned reports.

Role(s) \* Receptionist

Is Provider  Billable Items Manager

Pin  Business Owner

State License Number  Enterprise

National License Number  Business Manager

Employee Number  Groomer

Dashboard

Practice Management

Search Options

Segment: \_\_\_\_\_ City: \_\_\_\_\_

Name: \_\_\_\_\_ State: \_\_\_\_\_

Id: \_\_\_\_\_ Server: \_\_\_\_\_

Id	Server	Name	Segment	Created	City	State	Total Count: 2
326	SE1	Covetrus eVet Equine Training	Equine	9/14/2015	Madison	GA	
238	SE1	Training - Covetrus	Albyn	4/13/2015	Wakarusa		

## Opening the Enterprise Dashboard

Access to the Enterprise Dashboard is granted via a Pulse user's role assignments.

- Once appropriate Enterprise roles are defined, a link for **Back to Enterprise Dashboard** will display in the upper right corner of Pulse.
- Clicking on this link will display the **Enterprise Dashboard**.



## Understanding Segments

Segments allow administrators to group “like practices” which is especially useful for setting prices by demographic or practice type.

						Total Count: 3
Id	Server	Name	Segment	Created	City	State
1024	W1	<a href="#">Support's Wicked Vet Clinic</a>	Georgia	10/17/2017	Athens	GA
122	W1	<a href="#">Support's Awesome Vet Clinic</a>	Georgia	9/18/2014	Loganville	GA
3	SE1	<a href="#">Sunrise Animal Hospital- DEMO SITE</a>	South Carolina	9/13/2012	Greenville	SC

### Important Points to Remember

- An unlimited numbers of segments can be defined.
- Each practice can be assigned to only one segment and it’s recommended that all practices be assigned to a segment.
- Segments can be used as a Search Option in the Practice Management section.
- All Practices within the Segment can be selected together when pushing updates.
- Price Settings are set for all Segments, for all billable items.

## Maintaining Centralized Billables

Before you can proceed with the syncing process you’ll first need to update the billable items from within the Enterprise Dashboard.

To begin, access the appropriate Billable Item list.

- Use the menus at the top of the Enterprise Dashboard to select the appropriate billable item type to update (Packages, Inventory Items, Procedures, or Labs).
- Utilize the same Search, Advanced Search, and Update Options in Enterprise that currently exist in Pulse.

[Dashboard](#) [Reports](#) [Species/Breeds](#) [Vendors](#) [Packages](#) [Inventory Items](#) [Procedures](#) [Labs](#)

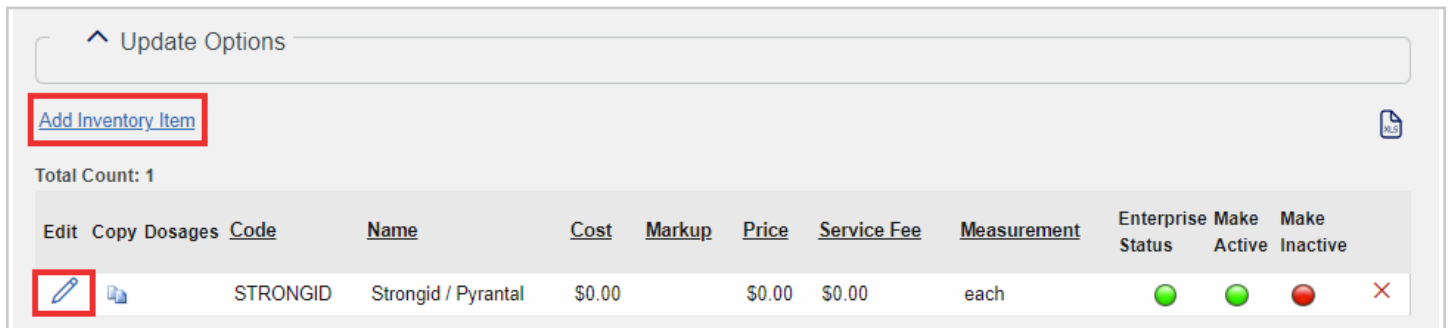


*Please remember, “Procedures” are referred to as “Services” at the practice level.*

## 1. Make Changes to the Desired Billable Items

When the billable item management window displays, it's now time to make the desired changes.







- Use the **edit pencil** in front of the item to open the **Edit Item** window OR click the link to add a new item.



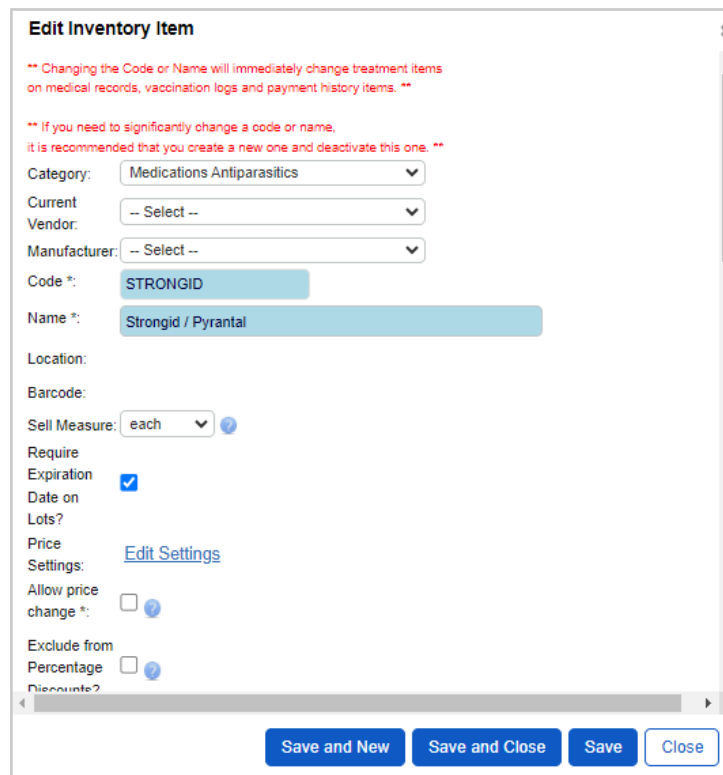
Update Options

[Add Inventory Item](#)

Total Count: 1

Edit	Copy	Dosages	Code	Name	Cost	Markup	Price	Service Fee	Measurement	Enterprise Status	Make Active	Make Inactive	
			STRONGID	Strongid / Pyrantal	\$0.00		\$0.00	\$0.00	each				

- Make any desired changes and click **Save**.



**Edit Inventory Item**

**\*\* Changing the Code or Name will immediately change treatment items on medical records, vaccination logs and payment history items. \*\***

**\*\* If you need to significantly change a code or name, it is recommended that you create a new one and deactivate this one. \*\***

Category: Medications Antiparasitics

Current Vendor: -- Select --

Manufacturer: -- Select --

Code \*: STRONGID

Name \*: Strongid / Pyrantal

Location:

Barcode:

Sell Measure: each

Require

Expiration

Date on Lots?

Price Settings: [Edit Settings](#)

Allow price change \*:

Exclude from Percentage Discounts?

Save and New Save and Close Save Close



The Enterprise edit screens reflect the same fields and functionality as the Pulse edit screens.

# ENTERPRISE DATA SYNC REFERENCE GUIDE

## 2. Create a Selective Sync

After the changes have been made to the billable items, you will need to push the changes down to the appropriate Enterprise practice segments by choosing desired practices or segments.

- Click on the **Create a Selective Sync** link within the Selective Sync area of the Dashboard.
- This will open the **Selective Sync** window.

Date	Employee	Selective Sync Summary
4/19/2024 6:37:14 PM	BH EntTest	<a href="#">1 Practices</a>   <a href="#">1 Billable Items</a>   <a href="#">1 Fields</a>
4/19/2024 6:37:14 PM	BH EntTest	<a href="#">1 Practices</a>   <a href="#">1 Billable Items</a>   <a href="#">1 Fields</a>

## 3. Select the Enterprise Practice Segment

When the **Selective Sync** window displays, a list of pre-defined practices and segments can be seen.

- Click on the **check-box** in front of the segment(s) to push the changes to.
- If a practice is part of a Segment, it will be displayed next to the practice name in parenthesis)
- Click **Next**.

**Selective Sync** ✕

Select the practices that you want to sync billable items to:

South Carolina  
 Sunrise Animal Hospital- DEMO SITE

Georgia  
 Support's Awesome Vet Clinic  
 Support's Wicked Vet Clinic

## 4. Choose the Billable Items

Next, indicate the billable items to include in the sync.

- Click on the boxes in front of the items to be “pushed” to the previously selected segment(s) or practice(s).
- The list is ordered by billable item type, category, then name.
- Uncheck the **Active Only** box to see a list of both active and inactive billable items.
- Click **Next**.

**Selective Sync**

Select the billable items you wish to sync:

Inventory

- Anti Parasitics
  - 0000 - selective sync
  - 0332 - Panacur suspension 10%
  - 0334 - Ivermectin 1%
  - 0335 - Cestex 50mg
  - 123 - Awesome Sauce
  - 1234 - OneTwoThree
  - 123456 - hey yall
  - 43534534 - testtest
  - 45 - 115 Cleaning Solution
  - 789456 - What up?!
  - 98765 - Manisha Enterprise test
  - Ashley2INV - Ashley2INV
  - AshleyINV - Ashley's Inventory Linking Item
  - AshleyINV2 - AshleyINV2
  - AwesomeInv - AwesomeInventory
  - ENT2024 - EnterpriseCOde
  - ENT202403 - Enterprise Dashboard INV

Active Only

## 5. Select the Billable Item Fields

Finally, choose the specific fields within the billable item to update.

- Select the **fields** you wish to sync, within those previously selected billable items, by **checking** the boxes.
- Click **Sync**.

# ENTERPRISE DATA SYNC REFERENCE GUIDE

**Selective Sync**

All properties for newly created items will be synced. For items that already exist at the practice, choose which fields you wish to override with the enterprise values:

- Abaxis Lab Item
- Allow Price Change
- ANTECH Lab Item
- Barcode
- Change Patient Sex
- Change Patient Status To
- Client Notes
- Code
- Common Name
- Cost
- Cubex
- Default number of months for payment schedule
- Dosages
- Exclude From Percentage Discounts
- Exclude From Production Calculations
- FUSE Item
- Hide On Invoice
- Hide on Medical Record Printout
- Hide on Medical Record View

Cancel Previous Sync

- A confirmation window will display, click **Yes** to continue.

**Selective Sync**

There is currently 2 billable item(s) selected to sync. Are you sure you would like to continue?

Yes No

## Synchronizing Logic

Selective Sync will either update or add selected items to a practice(s) in Pulse.

Before the sync is performed, Enterprise will check for the following information to determine whether to add or update an item:


- **Replication Key Found:** Enterprise will ONLY SEND THE SELECTED FIELDS.
- **Item Code Match Found:** Enterprise will ONLY SEND THE SELECTED FIELDS and set the Replication Key.
- **No Matches Found:** If a match is not found, the initial sync (or “primary push”) will create the item and update ALL FIELDS, in the selected list, for the desired segment(s).







# Viewing Changes

Users with access to the Pulse billable items have visibility to items maintained by Enterprise in their practice.

## Information Icon

When complete, an  will appear after the code, on the items included in the sync. This indicator flags that the item is part of an Enterprise sync and can be viewed at the practice level, within the billable items list.

Total Count: 9

Edit	Copy	Code	Name	Cost	Markup	Price		
		BH-LAB11 	BH Lab 111	\$4.44		\$20.44		
		BH-LAB10020	Created/Modified by Corporate Administrator	\$0.00		\$0.00		

## Creation & Modification Tag

Those same items will also be labeled with a **Creation and Modification** tag within the billable items list at the practice level.

Has Client Notes?

Has Restrictions?

Has Tier Pricing?

**Created: 1/15/2024 3:14 PM ENTERPRISE SYSTEM**

**Modified: 4/19/2024 2:40 PM ENTERPRISE SYSTEM**

## Selective Sync Summary

When the sync is complete, a line will be added to the **Selective Sync Summary** section of the Enterprise Dashboard.

Selective Sync - [Create a Selective Sync](#)

Date	Employee	Selective Sync Summary
5/3/2024 7:06:23 PM	BH EntTest	<a href="#">1 Practices</a>   <a href="#">1 Billable Items</a>   <a href="#">7 Fields</a>
5/3/2024 6:55:56 PM	BH EntTest	<a href="#">1 Practices</a>   <a href="#">1 Billable Items</a>   <a href="#">7 Fields</a>

# ENTERPRISE DATA SYNC REFERENCE GUIDE

- Click on the [link](#) to view details about the push.

### Selective Sync Summary ✕

Summary of the Selective Sync on 5/3/2024 7:06:23 PM

- 1 Practices
  - Training - Covetrus
- 1 Billable Items
  - Inventory
    - BH\*
      - BH\*0430-2 - BH new with def Qty - 3333
- 7 Fields
  - Client Notes
  - Is Dispensable
  - Is Medication
  - Is Microchip
  - Location
  - Restrictions
  - Vaccine Setup

[Close](#)