Enterprise

Data Sync Reference Guide

PULSE®

software.covetrus.com | 855.478.7920

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:

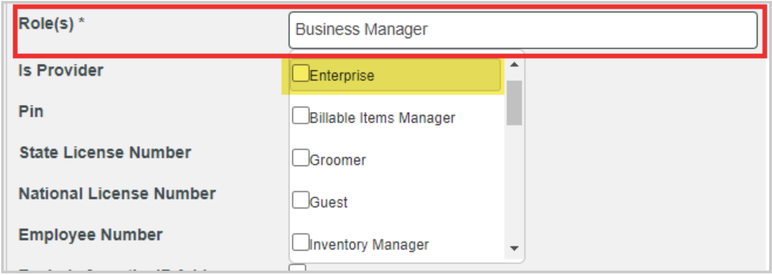
1. Site Accessibility and Billables Management
2. Site Accessibility Only

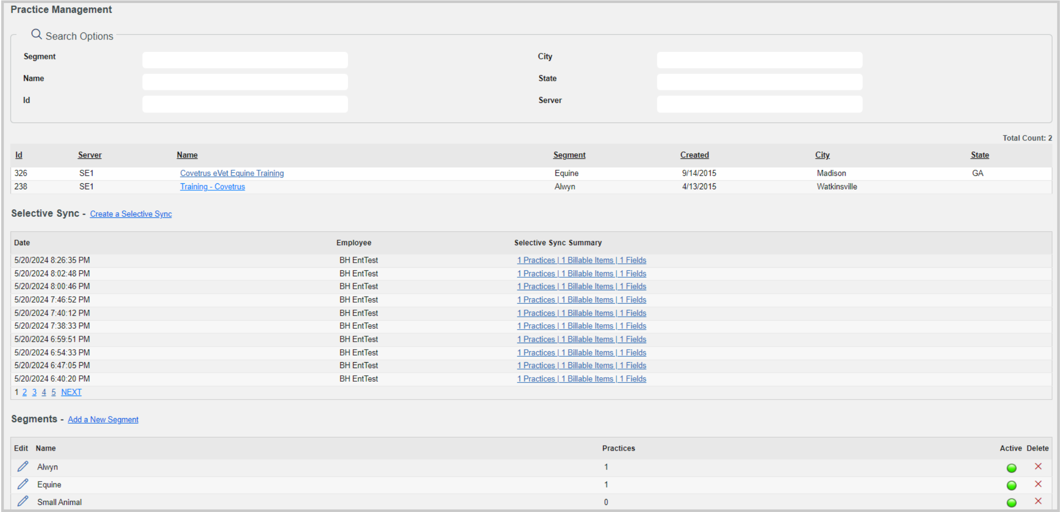
The Enterprise user role cannot be used as a stand-alone and must be used in conjunction with another role.

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

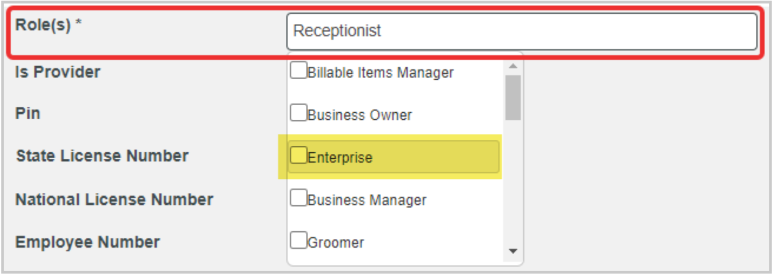


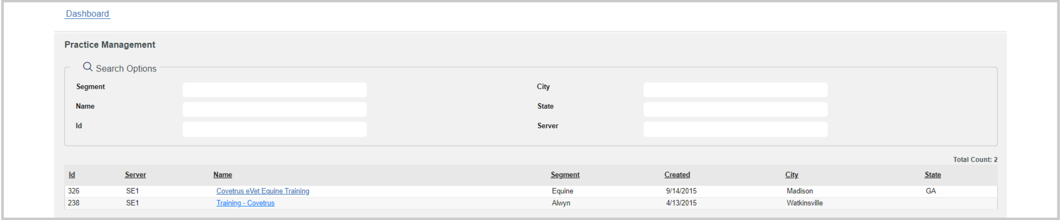


Site Access Only

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.





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	Support's Wicked Vet Clinic	Georgia	10/17/2017	Athens	GA
122	W1	Support's Awesome Vet Clinic	Georgia	9/18/2014	Loganville	GA
3	SE1	Sunrise Animal Hospital- DEMO SITE	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.

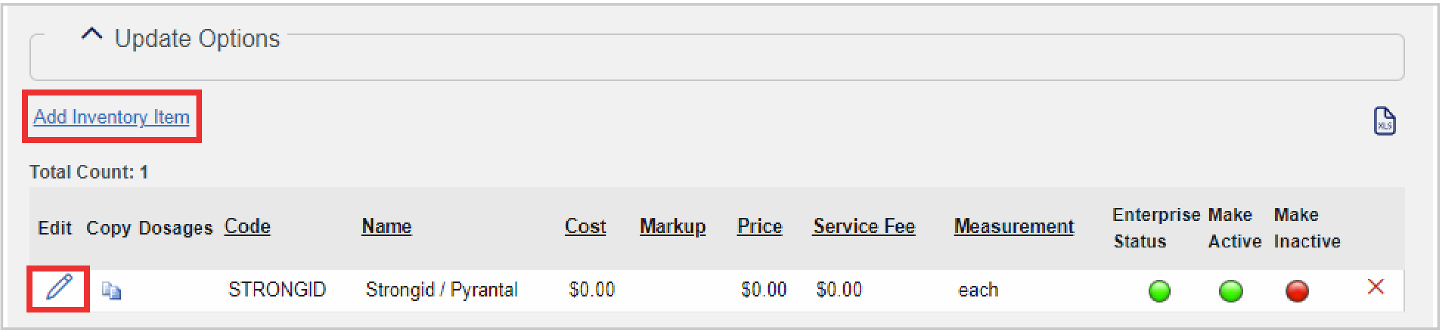
Dashboard Reports Species/Breeds Vendors Packages Inventory Items Procedures Labs

Please remember, "Procedures" are referred to as "Services" at the practice level.

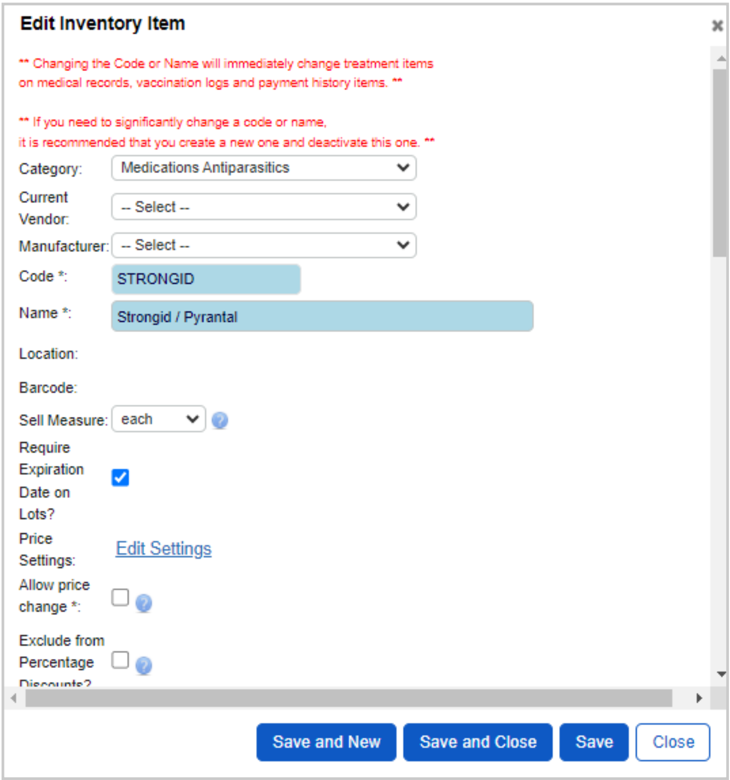
1. Make Changes to the Desired Billable Items

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.



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

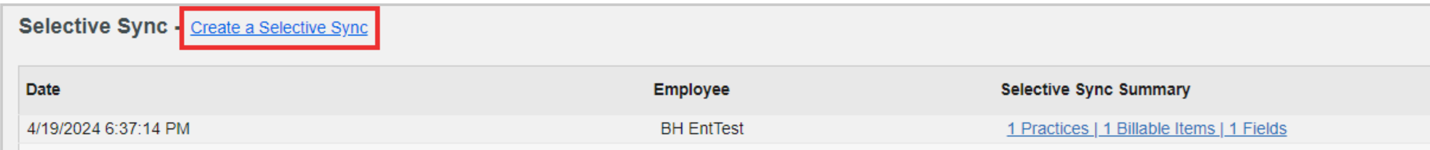


The Enterprise edit screens reflect the same fields and functionality as the Pulse edit screens.

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.

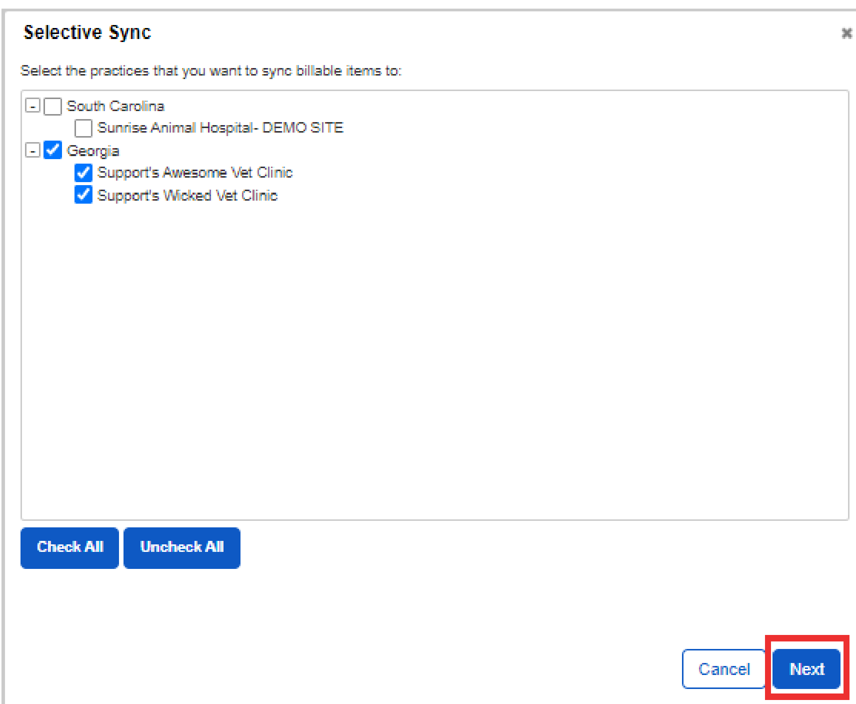
- Click on the **Create a Selective Sync** link within the Selective Sync area of the Dashboard.
- This will open the **Selective Sync** window.



3. Select the Enterprise Practice Segment

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

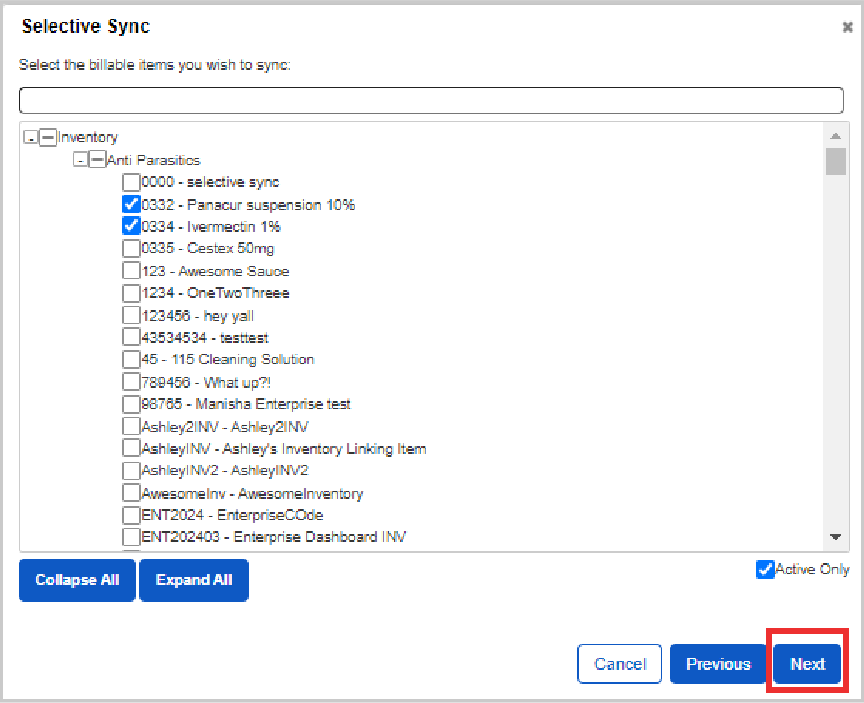
- Click on the **check-box** in front of the segment(s) to push the changes to.
- If a practice is part of a Segment, it will be displayed next to the practice name in parenthesis)
- Click **Next**.



4. Choose the Billable Items

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

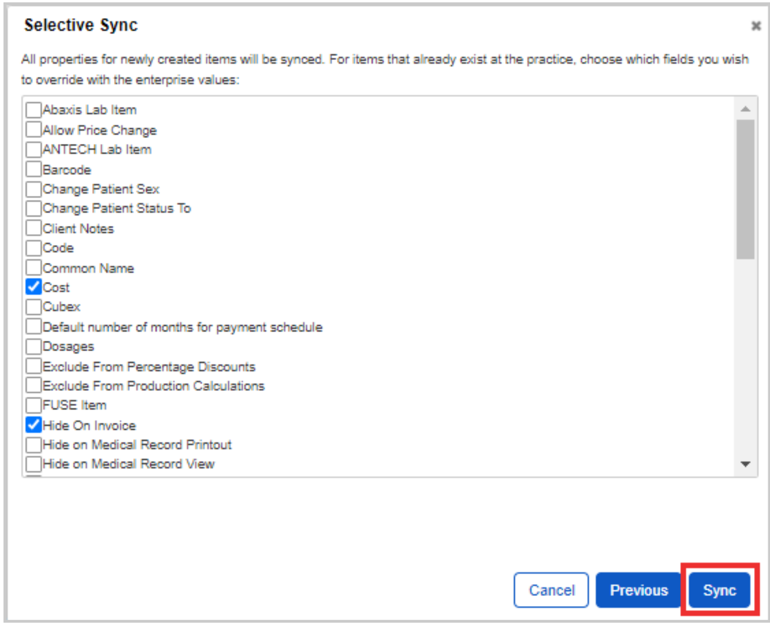
- **Click** on the boxes in front of the items to be “pushed” to the previously selected segment(s) or practice(s).
- The list is ordered by billable item type, category, then name.
- Uncheck the **Active Only** box to see a list of both active and inactive billable items.
- Click **Next**.



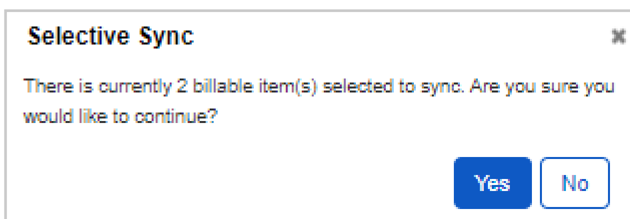
5. Select the Billable Item Fields

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**.



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



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:

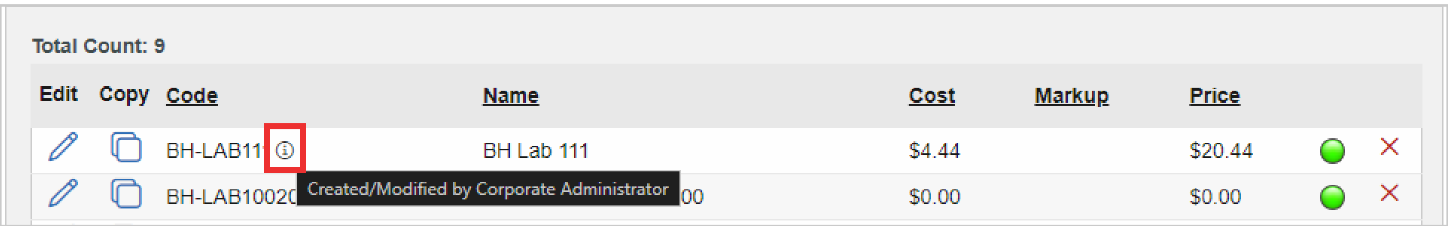
- **Replication Key Found:** Enterprise will ONLY SEND THE SELECTED FIELDS.
- **Item Code Match Found**: Enterprise will ONLY SEND THE SELECTED FIELDS and set the Replication Key.
- **No Matches Found**: If a match is not found, the initial sync (or “primary push”) will create the item and update ALL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

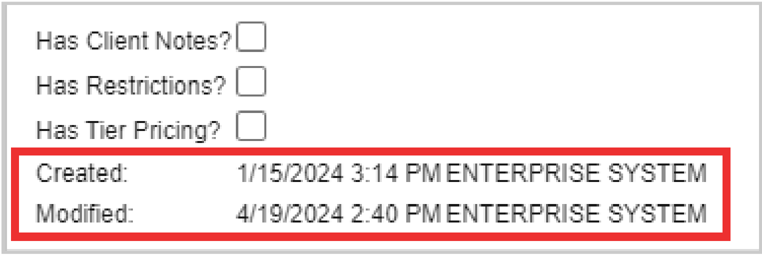
Information Icon

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.



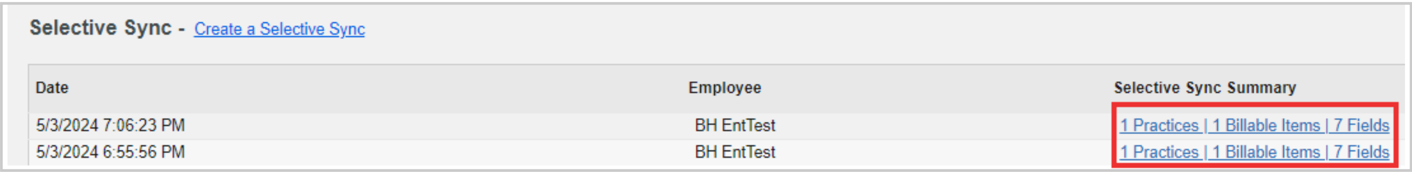
Creation & Modification Tag

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



Selective Sync Summary

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



- Click on the **link** to view details about the push.