MindPulse Management & Operations Module

User Manual

For the Director and approved staff. A practical guide to customer relationships, project delivery, daily staff hours and financial records.

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Open Home to reach About, Instructions or Login. This manual is also available as a PDF download on the Instructions page.

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Keep company information private

This manual contains no client records, project financials or private timesheet entries. Company records are shown only in the signed-in workspace. Do not share passwords or export files containing company data outside approved channels.

Accounts & navigation

Create your account

Use your individual work email. Staff access must be approved by the Director; creating an account alone does not grant access to company records.

1. Select **Login**, then **Create an account**.

2. Enter **Full name**, **Work email** and a **Password** of at least eight characters. Select **Create account**.

3. Open the confirmation link in your work email. Check junk or spam if it is not in your inbox. Return to Login and sign in.

4. Staff see an awaiting-approval message until approved. The verified Director work account receives Director access automatically.

Director: approve a staff member

Open **User Management** under Administration. Review the pending registration and select **Approve** for the correct person. Staff can select **Check approval** on their waiting screen to refresh access.

Find your way around

The left menu contains **Home**, **Instructions**, **Dashboard** and **Staff Hours**, followed by collapsible lifecycle groups. Select a group name to show its pages. On a phone, open the navigation menu in the top bar.

Create, edit and search

Open a register and use its add action to create a record. Select a record name to open its details; editable fields depend on your permissions. Complete required fields marked with an asterisk, then select **Save**. Use search and status filters to narrow a register. **Cancel** closes a form without saving your changes.

Sign out or recover a password

Use the sign-out action when finished, especially on a shared device. If you forget your password, choose **Forgot password?** on Login and follow the emailed reset link.

Leads to signed contracts

Lead generation: record the relationship

Open **Lead generation → Clients** and add the organisation if it is not already recorded. Capture the contact, position, work email, phone, website, country and industry. Check existing records first to avoid duplicates.

1. Open **Leads & sources** and add a lead.

2. Enter a title, select its client and pipeline stage, and choose its source: conferences, email outreach, social media, referrals, old clients, incoming RFQs or another relevant source.

3. Enter estimated value and its currency, country, decision date, follow-up date and research requirements. Select **Save lead**.

Lead qualification

Open **Qualification & RFQs**. Record whether the RFQ has been shared, needs validated, budget confirmed and decision-maker identified. Enter the timeline and qualification notes, update the pipeline stage and save.

Opportunity management

Open **Opportunities**. Develop the proposed solution or methodology, scope, expected value, currency and next follow-up. These pages are different views of the lead register, not separate opportunities that must be duplicated.

Proposal and quotation — Director editing

Open **Quotations & SOW**. Select the client and linked lead; enter amount, tax, currency, status, dates and version. Use the scope field for research objectives, methodology, sample, deliverables and costing. Open a saved quotation to download its PDF or create a **Revision**.

Contract approval and signing — Director editing

Open **Approvals & signing**. Record commercial, legal and financial approval, client signature and signing date. Save the correct status. The **Commission** action on a saved quotation creates its linked project; verify the resulting project and complete its delivery details.

Approved staff and the Director can enter clients, leads and project details. Staff can read quotations but cannot edit them. A recorded status is not a substitute for the actual commercial or legal approval.

Project delivery & acceptance

Project initiation

Open **Project initiation → Projects**. Add a project or open the project created from a commissioned quotation. Select the client; enter commissioned value and currency, status, research stage, completion percentage, dates and project manager. Use the scope field for deliverables, purchase order and project instructions. Save the project.

Assign staff — Director

Open a saved project. Under **Assigned team**, use **Assign staff…** to select an approved staff member. Assignments and the field-cost roster serve different purposes; adding a roster name does not create a staff login.

Team and field costs — Director

Open **Team & field costs**. Select the project and record the person’s name, role (Project Manager, Supervisor or Interviewer), phone, daily wage, days engaged and transport cost. Enter amounts consistently with the project currency.

Budgets and expenses — Director

Open **Budgets & expenses**. Use the budgets view for planned budget lines and the expenses view for actual costs. Select the project and category; enter amount, vendor where applicable, date and approval status. Avoid counting the same team wage or transport cost again as an expense.

Execution

Open **Tasks & milestones** for task instructions, assigned staff, priority, deadline and status. Update the project’s stage and completion percentage as delivery progresses. Staff editing of tasks is limited to permitted status and progress-note changes.

Quality control and change records

Under **Quality control**, the Director records QC, back-checks and back-calls, the deliverable reviewed, decision, date and comments. **Change control** captures requested scope changes and their cost/time impact; advanced approval routing is not yet implemented.

Client acceptance

Open **Client reviews**. Record the deliverable, review date, client comments and decision: Pending, Accepted, Rejected or Revisions Requested. Preserve all relevant client feedback. Review records are readable by approved users, with Director editing in the current version.

Daily Staff Hours

Every staff member, including the Director, should record work against each project daily. Complete entries at the end of the working day in Kenya time: EAT (UTC+3).

1. Select **Staff Hours** directly below Dashboard. Open the add action for a new hours entry.

2. Select the **Project** and correct work **Date**. Check the date explicitly rather than relying on the default.

3. Enter **Start time** and **End time**. The form displays the calculated hours. End time must be later than start time.

4. Describe the **Work done** and select the **Activity category**.

5. Choose **Draft** for an unfinished entry or **Submitted** when ready for Director review. Select **Save hours entry**.

6. Check that the entry appears in the register with the correct project, date, hours and status. Use another entry for a different project or separate work session.

Accuracy checks

Record actual work time, not an estimated whole day. Split entries around unpaid breaks or gaps. Entries for the same person must not overlap; the system rejects overlapping work sessions. Enter separate daily sessions rather than an overnight start/end pair.

Staff activity logs and timesheets

Staff activity logs allow more detailed outputs, blockers and next actions. **Timesheets** displays the saved activity entries for review. Staff Hours, activity logs and timesheets refer to the same underlying work records; do not re-enter the same work in all three pages.

Director review

Open the timesheet or activity register. Review a submitted entry and use **Approve** where available. Staff see their own detailed work entries; shared productivity totals do not reveal another person’s private activity details.

Daily reminder status

Daily end-of-day reminder emails are not active yet: the sending domain still needs to be set up. Until then, use your own daily reminder. Do not assume an email will arrive.

End-of-day checklist

Confirm today’s projects and dates; verify start/end times; describe the output; remove any overlaps; submit completed entries; check that saved rows are visible.

Invoices, payments & reports

Financial transaction details and editing are Director-only. Keep KES, USD, GBP and EUR distinct. Do not add amounts in different currencies without a specified conversion and reporting currency.

Generate an invoice

Open **Invoice generation → Invoices**. Select client and project; choose Deposit, Milestone, Interim, Final or Additional. Enter the amount excluding tax, the separate **VAT / tax amount (if applicable)**, currency, invoice date and due date. Use **Issued** for an issued invoice and save. VAT is entered as an amount, not a percentage.

Share and retain the invoice

Open the saved invoice to inspect its total and balance and download the **PDF**. Retain the actual copy shared with the client using **Attach supporting document**. Itemised invoice/quotation line-item editing is not yet implemented.

Allocate a payment

Open **Payment collection → Payments**. Select the invoice, enter **Amount received**, **Payment date** and **Payment reference**, then save. Reopen the invoice and check that the remaining balance reflects the payment. A payment belongs to its selected invoice and follows that invoice’s currency.

Reconciliation and profitability

Open **Profit & margins**. Review each project and the running monthly revenue, cost and profit for the selected currency. In this view, revenue is non-draft, non-cancelled invoice value excluding VAT; cost is approved expenses plus team wages and transport. Profit is revenue minus cost. Margin is profit divided by revenue when revenue is non-zero. This is not cash collected or a complete statutory accounting statement.

Dashboard and exports

Choose the reporting currency and available date filters before reading the Dashboard. Quoted, commissioned, invoiced and collected values represent different lifecycle stages. Use **Reports** or **Export report** to download the available PDF or Excel output. Check the currency, period and visible records before sharing.

Weekly AI summary

On Dashboard, select a week and choose **Summarise**. The summary uses saved project, timesheet and invoice records visible to your account and links to source records. Review those sources before relying on the wording. AI summaries use AI credit and can make mistakes.

Documents & troubleshooting

Upload and open supporting files

Save the parent record first, reopen it, then choose **Attach supporting document** and select the file. Project attachments are linked to the saved project; records with a Project field use the selected project. Under **Documents & receipts**, use **Open** to retrieve a saved file. Do not assume every attachment is automatically linked to a specific invoice or quotation.

I cannot get into the workspace

Confirm your work-email account using the emailed link and sign in again. A staff waiting screen means approval is still needed. Use **Check approval** after the Director approves you. For a forgotten password, use the reset link from Login.

I cannot edit a field or see a financial menu

Access differs by role. Approved staff can enter clients, leads, projects and their own work hours. Financials, field-cost management and certain approval/review pages require Director access. Disabled fields are not a reason to create a duplicate record.

My hours will not save

Check the date, project, work description and start/end times. End time must follow start time and entries must not overlap your other sessions. Read the form’s error message, correct the entry and try saving again.

A lead disappeared from qualification or opportunities

Those registers filter leads by pipeline stage. Look in **Leads & sources** and check the record’s current stage before creating a replacement.

The Dashboard or AI summary is empty

Check the selected period/currency and whether relevant records have been saved. The public Home page contains no company records. AI summaries can only summarise records available for the selected week and your account.

Current limits

Daily reminder emails await sending-domain setup. Reading Gmail/inbox messages and creating leads automatically is deferred. Advanced change-approval routing, structured quotation/invoice line items, grouped weekly/monthly timesheet compliance and backup verification are not yet complete. Real-team email delivery and approval checks still require the team’s registered, confirmed accounts.

Use the on-screen Instructions page for the quick-start guide. This manual documents the app as at the edition date; later updates may change available controls.