Pulse Release Notes – 14.02

Watershed Items

Watershed items are the most important changes in the release. They are indicated in the release notes by a gold star

Service Module

- Notification Attachments
- Timesheet Improvements
- Survey Copying and Adding Questions Simplified
- Client Portal Category Descriptions

Inventory Module

- Stock Movement Documents and Service Requests more easily linked on both interfaces

Financials

Email Purchase Order on Assignment

Pulse can be set up to email Purchase Orders to the assignee on assignment. Let us know if you would like us to set this up for you.

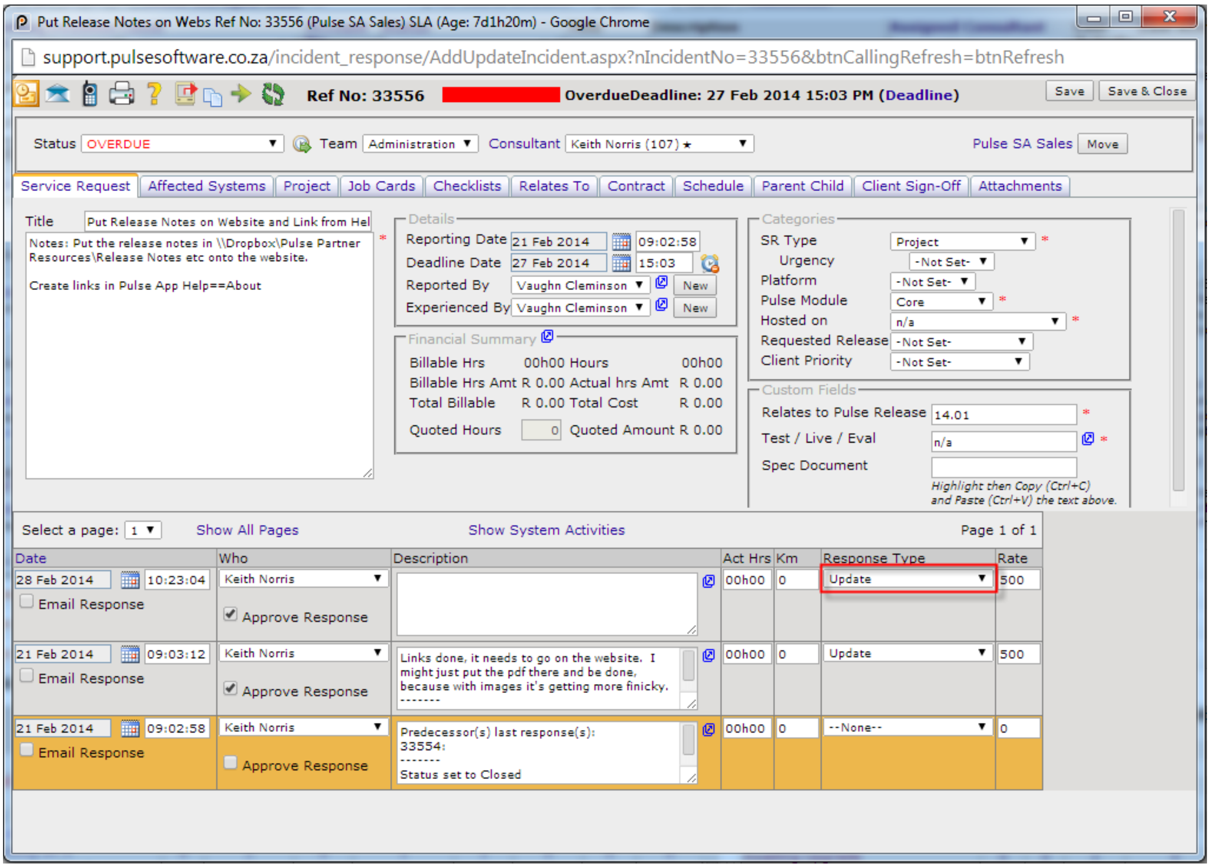
Recurrent Invoices include Contract Name

Recurrent invoicing has been extended to include the contract name in the invoice subject.

Service

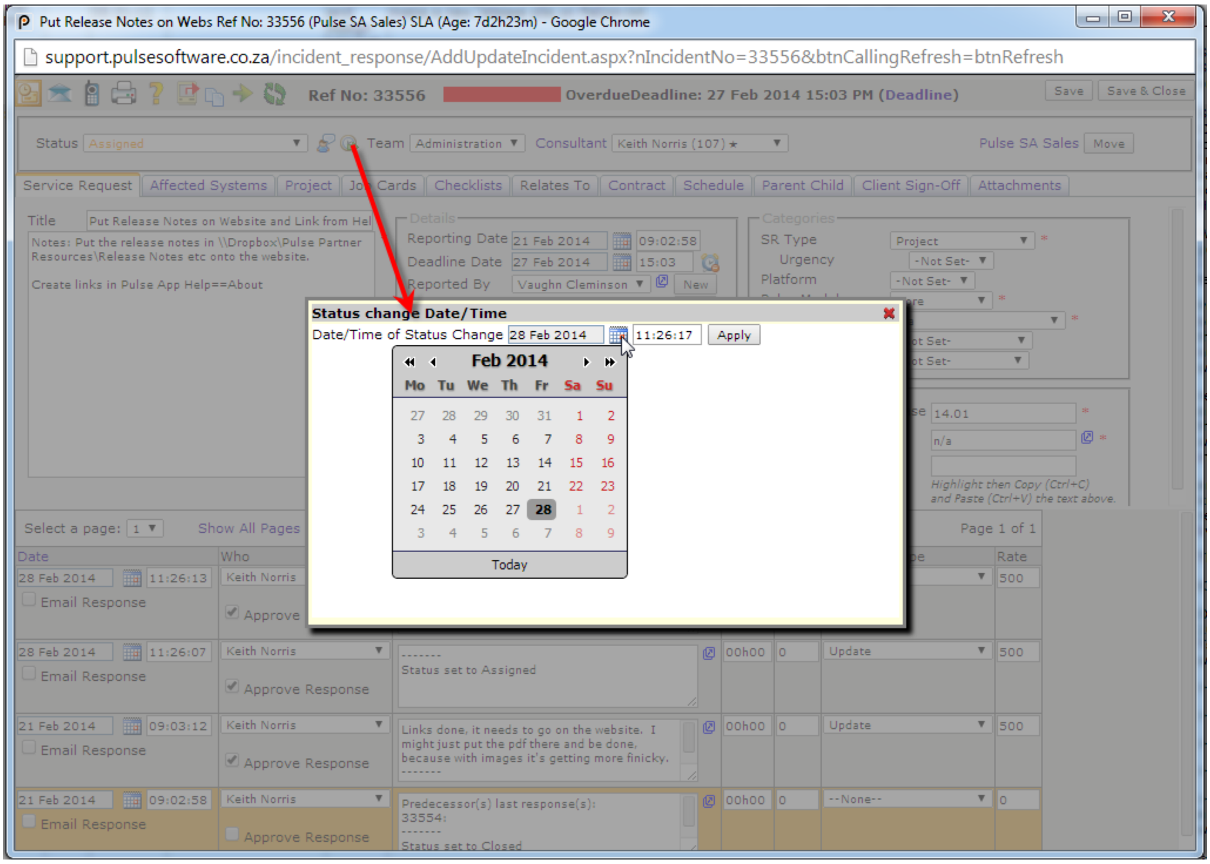
Response Types Can be Hidden

Response types can now be hidden so that they no longer appear in the drop down on the service request.



Response Date Prompt on Status Change Buttons

Status change buttons can be set to always prompt for a response date if required. Please let us know if you would like help in setting this up.



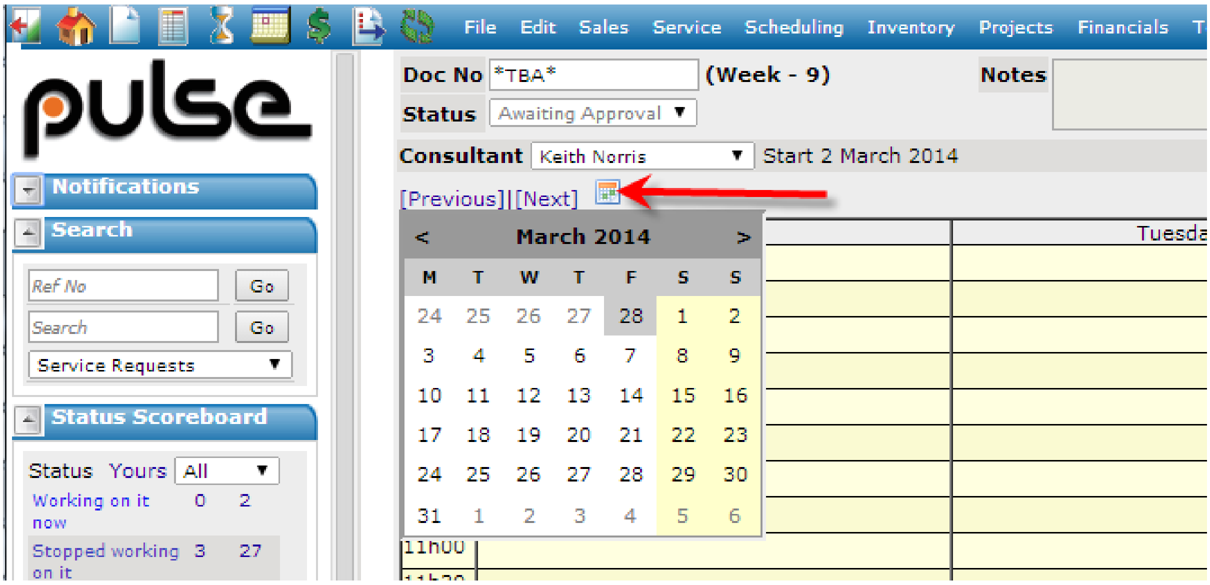
Notification Attachments

Notifications now support attachments. These are generated via SQL Reporting Services and rendered to an Excel spreadsheet, pdf document or Word document. Any data that is associated with the Service Request can be used to populate the attached file.

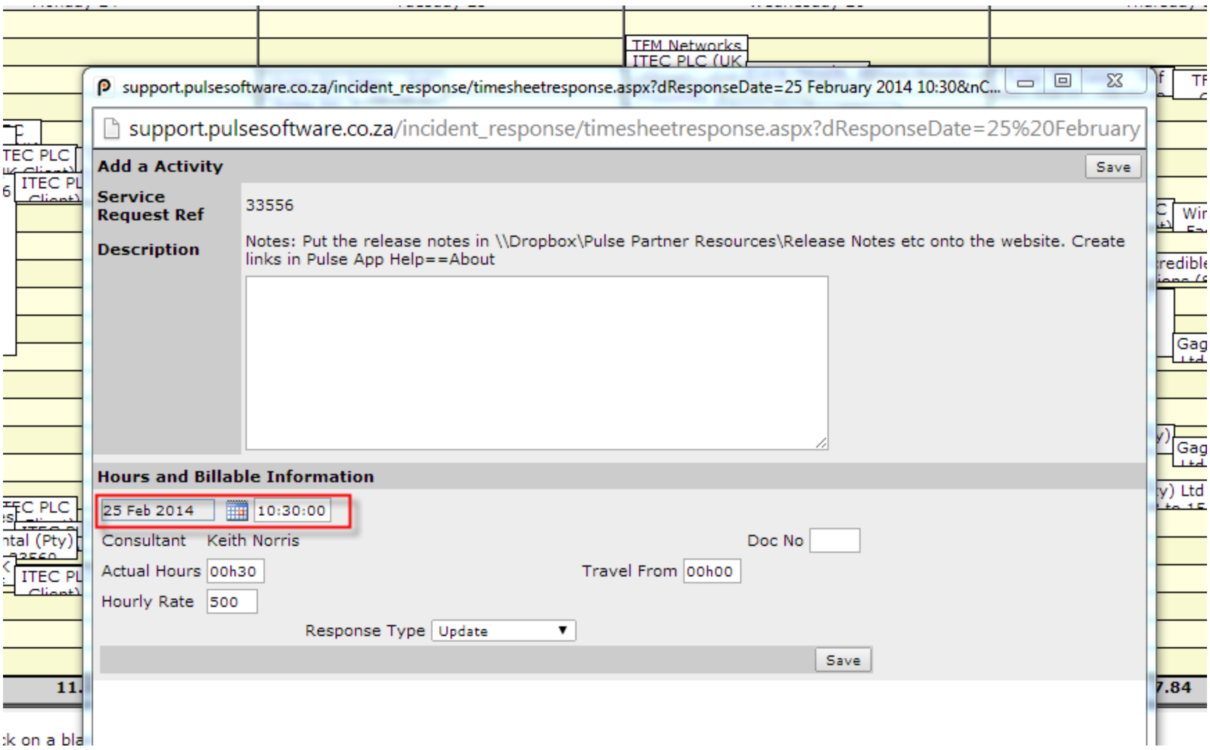
We are very excited to offer this functionality as it has been one of the most popular requests from our users. Please let us know if you would like us to set it up for you.

Timesheet Improvements

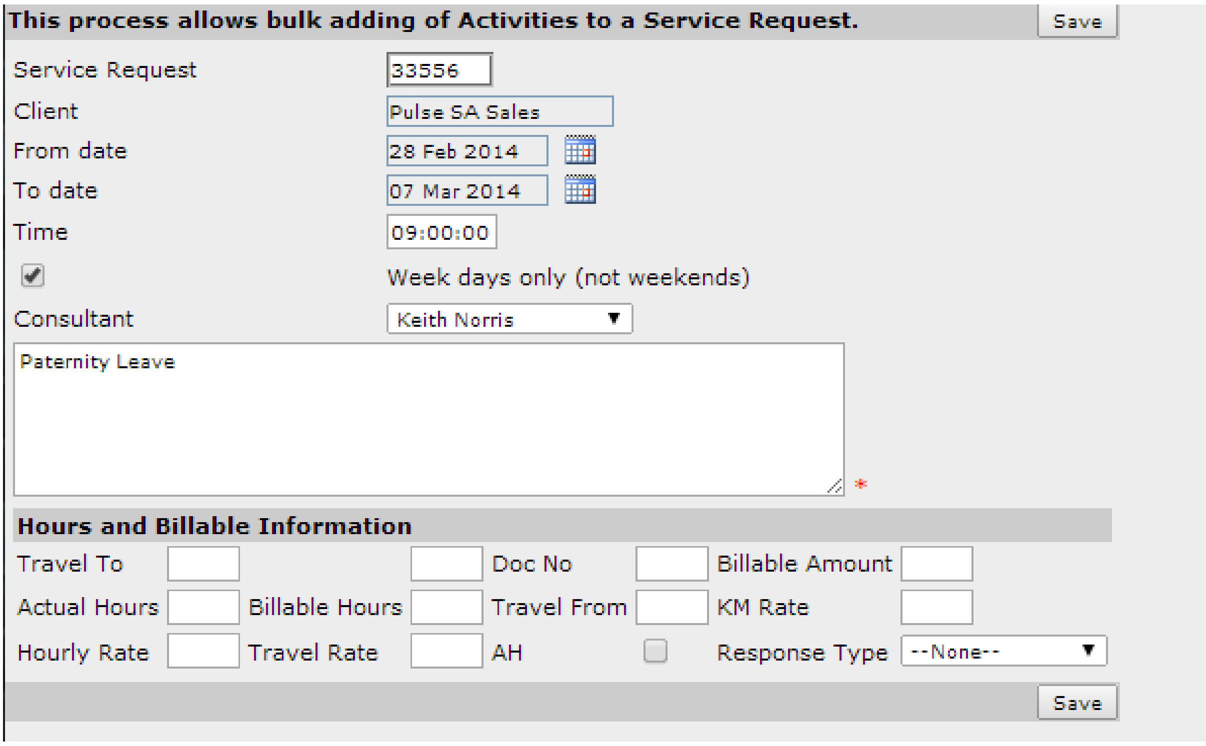
A date picker on the timesheet allows you to go directly to the week required, instead of having to use the [Next] and [Previous] links.



There is now also a date picker on the timesheet response page to make it easier to use.

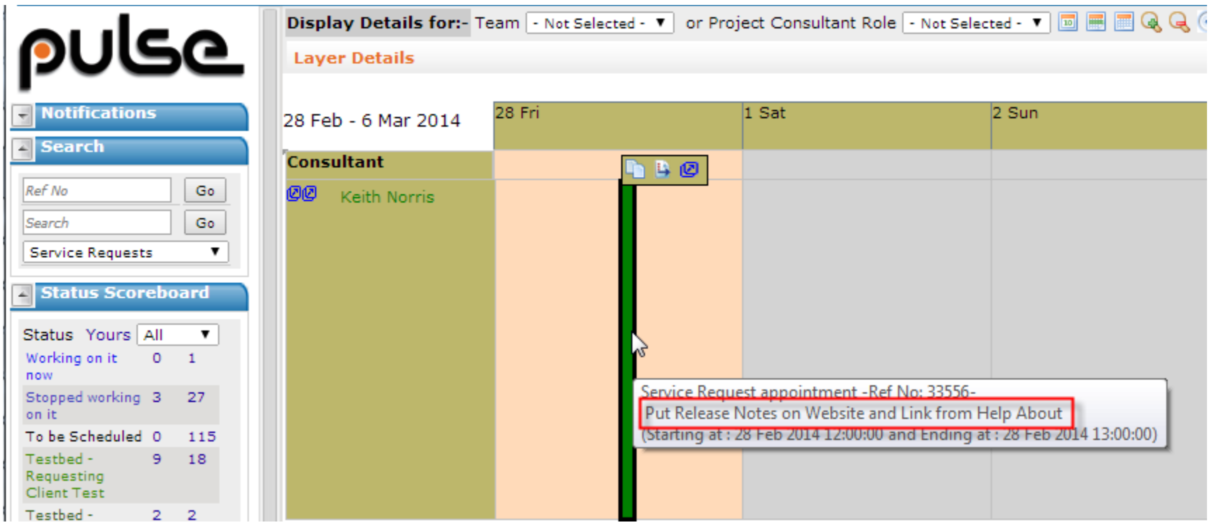


A new administrative function allows the bulk capturing of time. This allows an employee’s maternity leave to be captured in one go, for instance.



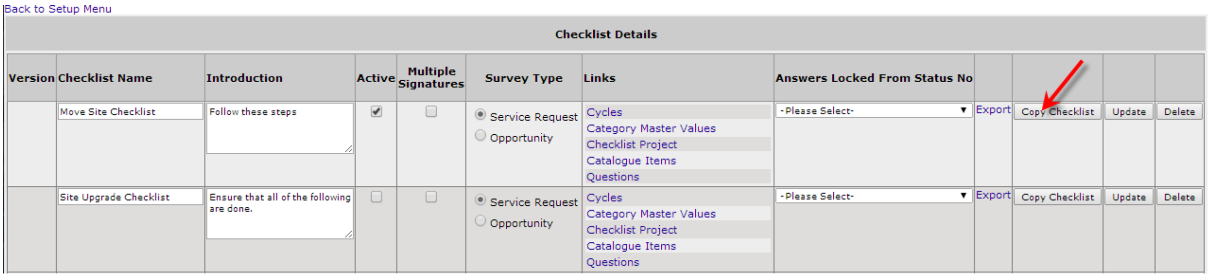
Service Request Title in Event Tooltip

Where an event is linked to a Service Request, the Service Request title now shows in the event tooltip for a quick-glance view of work to be done.



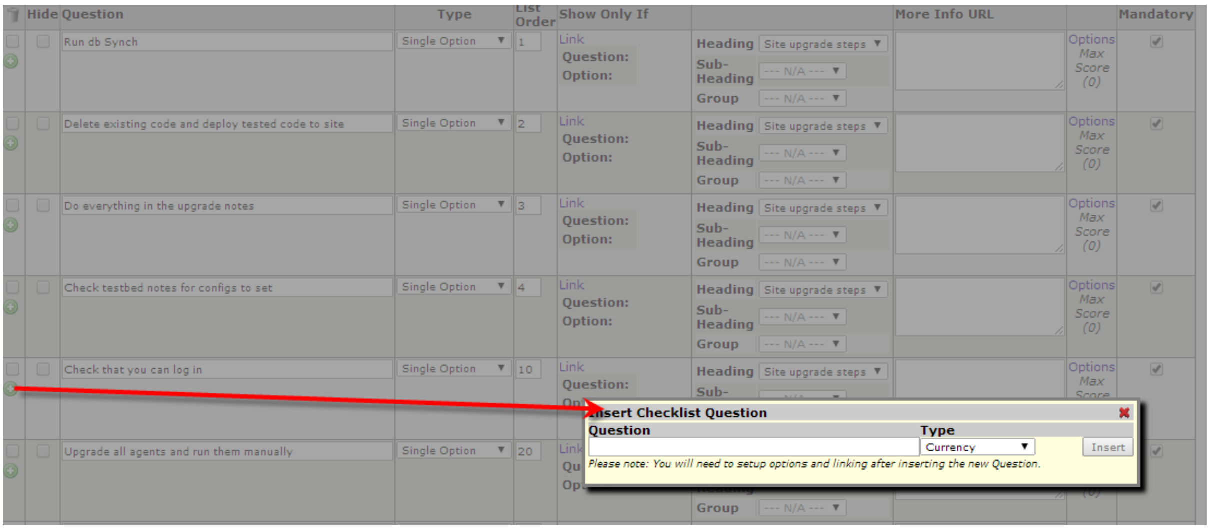
Survey Copying

Surveys / checklists can now be copied so that it is easy to make new ones with changes. This addresses the challenge of changing questions on existing surveys, which would mean that existing completed surveys could not be compared.



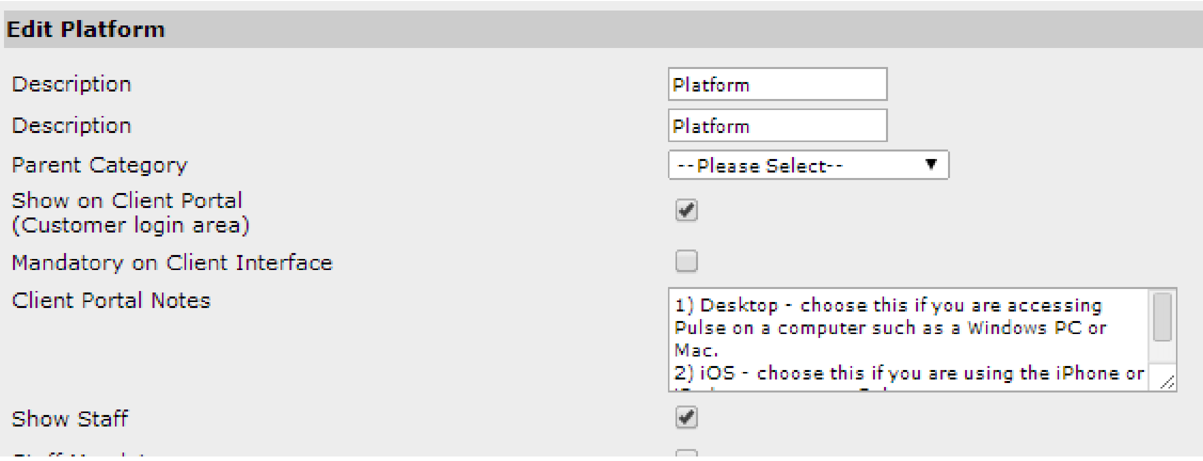
Adding a Question to a Survey Simplified

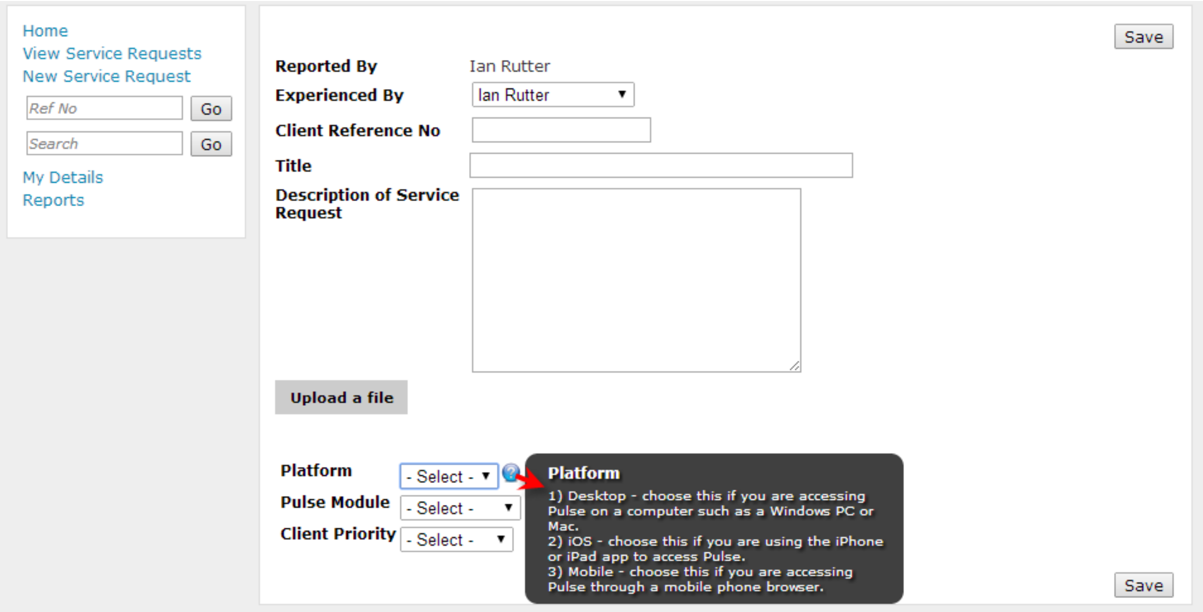
In the past it was difficult to add a question into an existing survey as you would need to manually edit the list order. We have simplified this by adding an icon after each question which will automate this for you.



Client Portal Category Descriptions

The categories available on your client portal can now include instructions for your customers, to help them choose how to categorise their request.



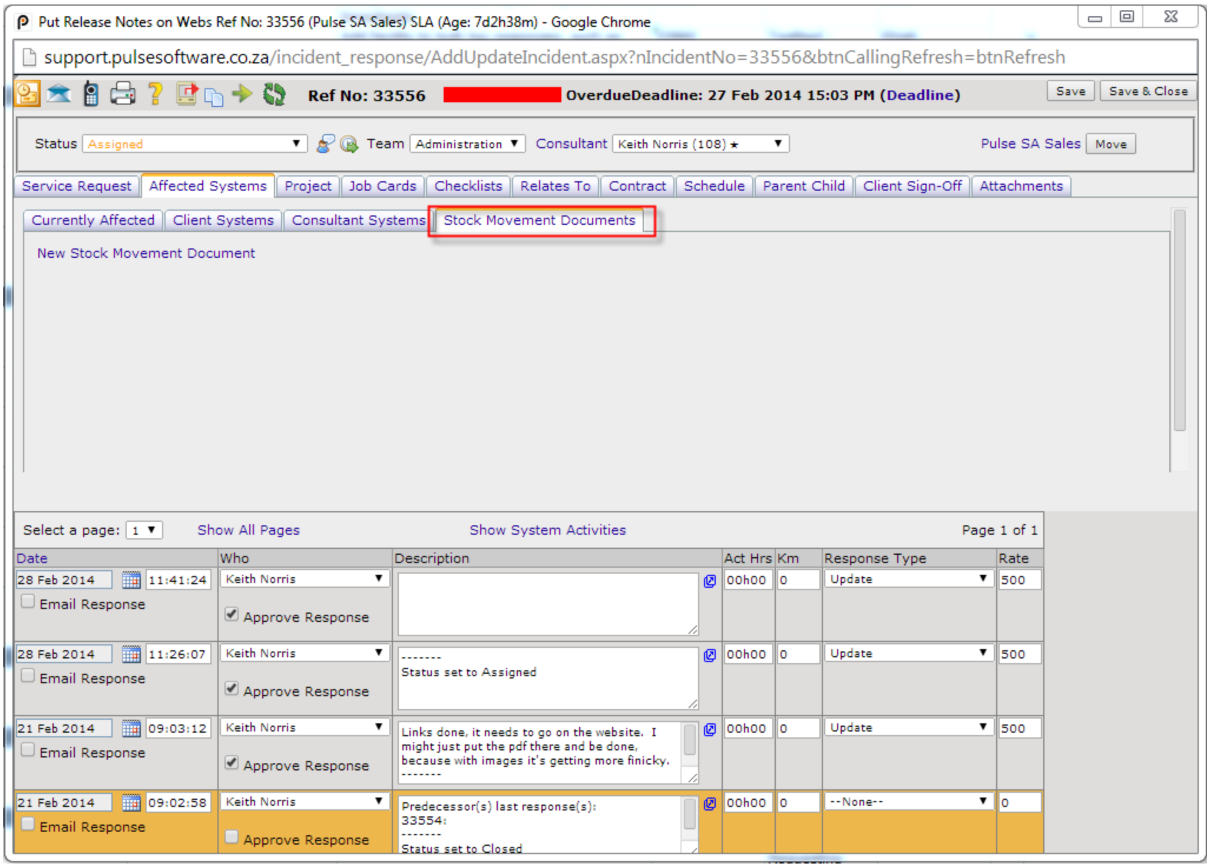


Inventory

Stock Movement Documents on the Service Request

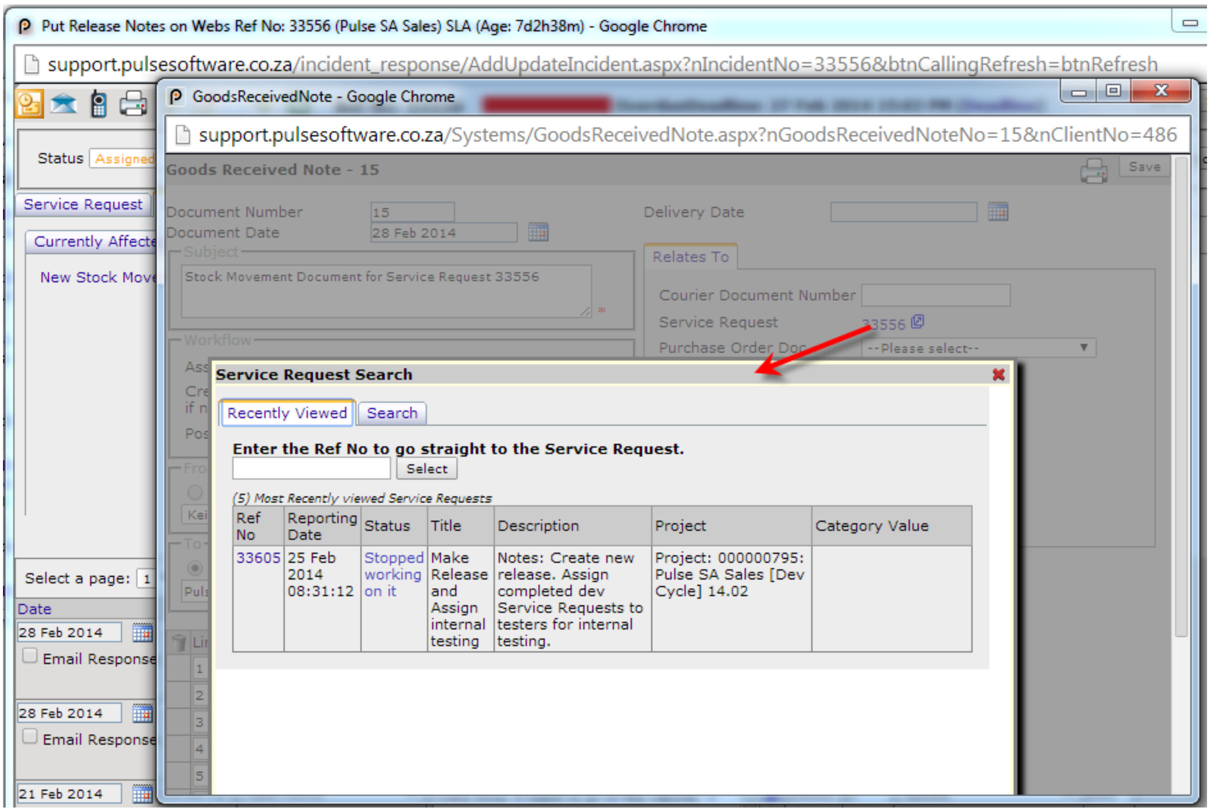
There is now a link to create a Stock Movement Document on the Service Request. Any existing Stock Movement Documents will appear in the same place, and can be opened from the Service Request.

Any stock moved using a linked Stock Movement Document will appear on the "Currently Affected Tab" as before.



Link Service Requests to Stock Movement Documents

There is now a link to create a Stock Movement Document on the Service Request. Any existing Stock Movement Documents will appear in the same place, and can be opened from the Service Request.



Sales

New Opportunity fields

It is now possible to selectively hide or show categories, and the client account number, on the New Opportunity quick add page.

Core

General Usability and Stability Improvement

As usual we have made a number of improvements to interface consistency and stability.

Some of these involve rewriting entire interfaces into new technologies. You may not notice the difference on your screen, but the application is more stable and faster as a result.