







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.

Put Release Notes on Website and Link from Hel...
Notes: Put the release notes in \\Dropbox\Pulse Partner Resources\Release Notes etc onto the website.
Create links in Pulse App Help==About

Reporting Date: 21 Feb 2014 09:02:58
Deadline Date: 27 Feb 2014 15:03
Reported By: Vaughn Cleminson
Experienced By: Vaughn Cleminson

Financial Summary
Billable Hrs: 00h00 Hours, 00h00
Billable Hrs Amt R 0.00 Actual hrs Amt R 0.00
Total Billable R 0.00 Total Cost R 0.00
Quoted Hours: 0 Quoted Amount R 0.00

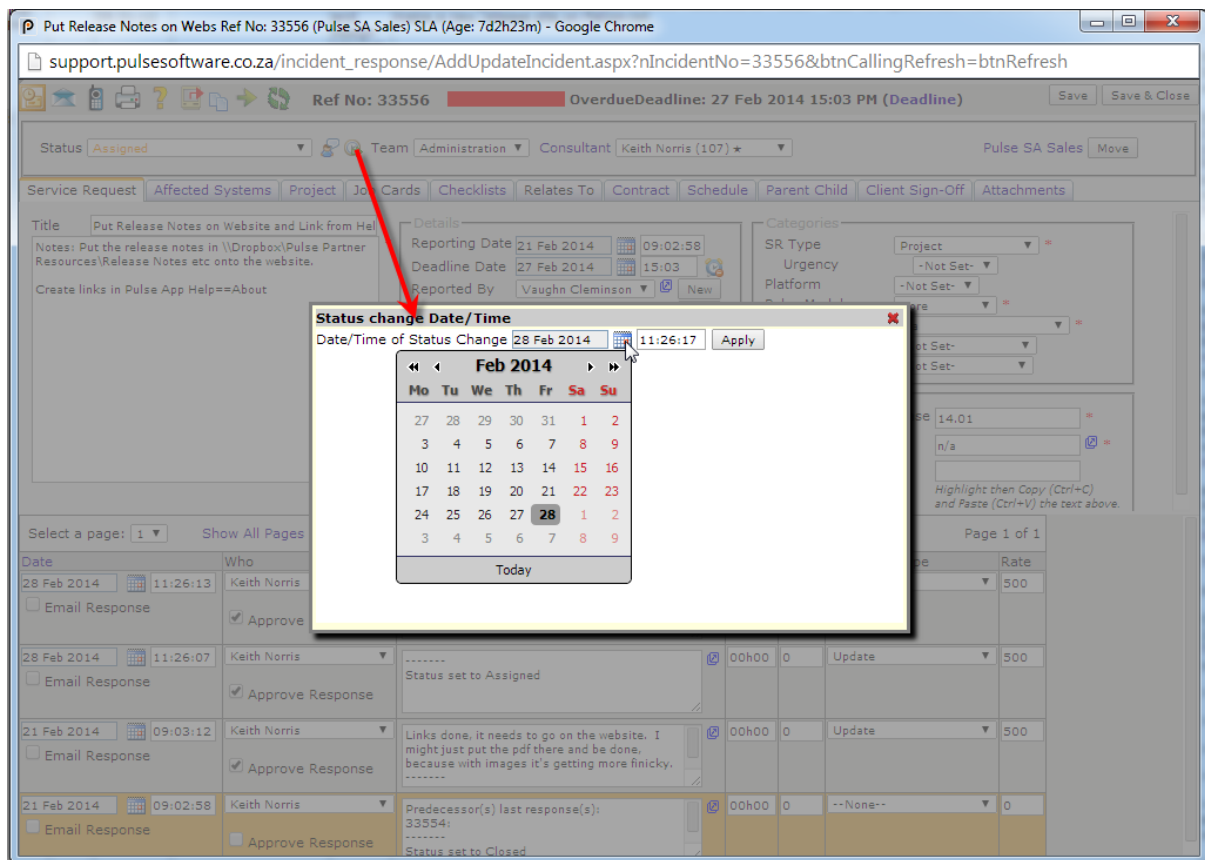
Categories
SR Type: Project
Urgency: -Not Set-
Platform: -Not Set-
Pulse Module: Core
Hosted on: n/a
Requested Release: -Not Set-
Client Priority: -Not Set-

Custom Fields
Relates to Pulse Release: 14.01
Test / Live / Eval: n/a
Spec Document:

Date	Who	Description	Act Hrs	Km	Response Type	Rate
28 Feb 2014 10:23:04	Keith Norris		00h00	0	Update	500
21 Feb 2014 09:03:12	Keith Norris	Links done, it needs to go on the website. I might just put the pdf there and be done. because with images it's getting more finicky.	00h00	0	Update	500
21 Feb 2014 09:02:58	Keith Norris	Predecessor(s) last response(s): 33554: Status set to Closed	00h00	0	--None--	0

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.



The screenshot shows a web application interface for managing service requests. A red arrow points to a calendar icon in the 'Status Change Date/Time' dialog box. The dialog box is open, showing a calendar for February 2014. The date '28 Feb 2014' is selected, and the time '11:26:17' is entered. The 'Apply' button is visible. The background interface shows a service request titled 'Put Release Notes on Website and Link from Helpdesk' with a status of 'Assigned' and an overdue deadline of '27 Feb 2014 15:03 PM'. The interface also displays a list of response actions with columns for Date, Who, and Rate.



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.

The screenshot shows the Pulse software interface. On the left, there are navigation panels for Notifications, Search, and Status Scoreboard. The main area displays a timesheet for Consultant Keith Norris, Week - 9, starting on 2 March 2014. A calendar for March 2014 is shown, with a red arrow pointing to a date picker icon next to the [Previous] and [Next] navigation links.

March 2014						
M	T	W	T	F	S	S
24	25	26	27	28	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

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

The screenshot shows a timesheet response form. The date picker is highlighted with a red box, showing the date 25 Feb 2014. The form includes fields for Service Request Ref (33556), Description, Hours and Billable Information, Consultant (Keith Norris), Actual Hours (00h30), Hourly Rate (500), and Response Type (Update).

support.pulsesoftware.co.za/incident_response/timesheetresponse.aspx?dResponseDate=25 February 2014 10:30&nC...

support.pulsesoftware.co.za/incident_response/timesheetresponse.aspx?dResponseDate=25%20February

Add a Activity [Save]

Service Request Ref: 33556

Description: Notes: Put the release notes in \\Dropbox\Pulse Partner Resources\Release Notes etc onto the website. Create links in Pulse App Help==About

Hours and Billable Information

25 Feb 2014 10:30:00

Consultant: Keith Norris Doc No: []

Actual Hours: 00h30 Travel From: 00h00

Hourly Rate: 500

Response Type: Update [Save]

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.

This process allows bulk adding of Activities to a Service Request. Save

Service Request

Client

From date

To date

Time

Week days only (not weekends)

Consultant

Hours and Billable Information

Travel To Doc No Billable Amount

Actual Hours Billable Hours Travel From KM Rate

Hourly Rate Travel Rate AH Response Type

Save

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.


The screenshot shows the Pulse software interface. On the left is a sidebar with 'pulse' logo, 'Notifications', 'Search' (with 'Ref No' and 'Service Requests' filters), and 'Status Scoreboard' (with a table of status counts). The main area is a calendar for '28 Feb - 6 Mar 2014'. A tooltip is displayed over a calendar event, containing the text: 'Service Request appointment - Ref No: 33556- Put Release Notes on Website and Link from Help About (Starting at : 28 Feb 2014 12:00:00 and ending at : 28 Feb 2014 13:00:00)'. The tooltip text is highlighted with a red box.



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.

[Back to Setup Menu](#)

Checklist Details										
Version	Checklist Name	Introduction	Active	Multiple Signatures	Survey Type	Links	Answers Locked From Status No			
	Move Site Checklist	Follow these steps	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/> Service Request <input type="radio"/> Opportunity	Cycles Category Master Values Checklist Project Catalogue Items Questions	- Please Select -	Export		Copy Checklist Update Delete
	Site Upgrade Checklist	Ensure that all of the following are done.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/> Service Request <input type="radio"/> Opportunity	Cycles Category Master Values Checklist Project Catalogue Items Questions	- Please Select -	Export		Copy Checklist Update Delete



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.

Hide Question	Type	List Order	Show Only If	More Info URL	Mandatory
<input type="checkbox"/> Run db Synch	Single Option	1	Link Question: Option:	Heading Site upgrade steps Sub-Heading --- N/A --- Group --- N/A ---	Options Max Score (0) <input checked="" type="checkbox"/>
<input type="checkbox"/> Delete existing code and deploy tested code to site	Single Option	2	Link Question: Option:	Heading Site upgrade steps Sub-Heading --- N/A --- Group --- N/A ---	Options Max Score (0) <input checked="" type="checkbox"/>
<input type="checkbox"/> Do everything in the upgrade notes	Single Option	3	Link Question: Option:	Heading Site upgrade steps Sub-Heading --- N/A --- Group --- N/A ---	Options Max Score (0) <input checked="" type="checkbox"/>
<input type="checkbox"/> Check testbed notes for configs to set	Single Option	4	Link Question: Option:	Heading Site upgrade steps Sub-Heading --- N/A --- Group --- N/A ---	Options Max Score (0) <input checked="" type="checkbox"/>
<input type="checkbox"/> Check that you can log in	Single Option	10	Link Question: Option:	Heading Site upgrade steps Sub-Heading --- N/A --- Group --- N/A ---	Options Max Score (0) <input checked="" type="checkbox"/>
<input type="checkbox"/> Upgrade all agents and run them manually	Single Option	20	Link Question: Option:	Heading Site upgrade steps Sub-Heading --- N/A --- Group --- N/A ---	Options Max Score (0) <input checked="" type="checkbox"/>

Insert Checklist Question

Question

Type

Please note: You will need to setup options and linking after inserting the new Question.



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.

Edit Platform

Description	<input type="text" value="Platform"/>
Description	<input type="text" value="Platform"/>
Parent Category	-- Please Select --
Show on Client Portal (Customer login area)	<input checked="" type="checkbox"/>
Mandatory on Client Interface	<input type="checkbox"/>
Client Portal Notes	<div style="border: 1px solid #ccc; padding: 5px;">1) Desktop - choose this if you are accessing Pulse on a computer such as a Windows PC or Mac. 2) iOS - choose this if you are using the iPhone or</div>
Show Staff	<input checked="" type="checkbox"/>

[Home](#)
[View Service Requests](#)
[New Service Request](#)

[My Details](#)
[Reports](#)

Reported By Ian Rutter

Experienced By

Client Reference No

Title

Description of Service Request

Platform
Pulse Module
Client Priority

Platform

1) Desktop - choose this if you are accessing Pulse on a computer such as a Windows PC or Mac.
2) iOS - choose this if you are using the iPhone or iPad app to access Pulse.
3) Mobile - choose this if you are accessing Pulse through a mobile phone browser.

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.

The screenshot shows a web browser window with the URL `support.pulsesoftware.co.za/incident_response/AddUpdateIncident.aspx?nIncidentNo=33556&btnCallingRefresh=btnRefresh`. The page title is "Put Release Notes on Webs Ref No: 33556 (Pulse SA Sales) SLA (Age: 7d2h38m) - Google Chrome". The page displays a service request for Ref No: 33556 with an overdue deadline of 27 Feb 2014 15:03 PM. The status is "Assigned" and the consultant is Keith Norris. The "Stock Movement Documents" tab is highlighted in red. Below the tab, there is a "New Stock Movement Document" link. At the bottom, a table shows system activities for the service request.

Date	Who	Description	Act Hrs	Km	Response Type	Rate
28 Feb 2014 11:41:24	Keith Norris		00h00	0	Update	500
28 Feb 2014 11:26:07	Keith Norris Status set to Assigned	00h00	0	Update	500
21 Feb 2014 09:03:12	Keith Norris	Links done, it needs to go on the website. I might just put the pdf there and be done, because with images it's getting more finicky.	00h00	0	Update	500
21 Feb 2014 09:02:58	Keith Norris	Predecessor(s) last response(s): 33554: Status set to Closed	00h00	0	--None--	0



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.

The screenshot shows a web application interface. The main window is titled 'Goods Received Note - 15'. It contains fields for Document Number (15), Delivery Date, Document Date (28 Feb 2014), and Subject (Stock Movement Document for Service Request 33556). A 'Service Request Search' modal window is open, displaying a table of service requests. A red arrow points to the 'Service Request' dropdown menu in the 'Relates To' section of the main form.

Ref No	Reporting Date	Status	Title	Description	Project	Category Value
33605	25 Feb 2014 08:31:12	Stopped working on it	Make Release and Assign internal testing	Notes: Create new release. Assign completed dev Service Requests to testers for internal testing.	Project: 00000795: Pulse SA Sales [Dev Cycle] 14.02	

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.