





Pulse Release Notes – 14.03

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

-  Multi-language Customer Satisfaction Surveys
-  Service Request Attachments Sent With Notifications

Service



Customer Satisfaction Surveys

In 14.03 we have worked hard to bring client-facing surveys to Pulse. The most obvious use for these is as customer satisfaction surveys, but they could just as easily be used to gather the information required in order to get work done, for example.

Your customers will receive an email with a link to the survey / checklist, which they can complete at their leisure in their browser. Each survey will be linked to the Service Request that generated it, and will know which customer, and which user at the customer, completed it.

1	Customer Satisfaction Survey	Customer Satisfaction Survey	<input type="checkbox"/>	<input type="checkbox"/>	English	<input type="radio"/> Live Task <input type="radio"/> Opportunity <input checked="" type="radio"/> Customer
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Multi-Language Client-Facing Surveys

The client-facing surveys are able to support any language that you can think of. Pulse comes with English, French, German, Italian, Spanish and Russian pre-configured, but any other language can easily be configured.

Client-facing surveys also support any alphabet you can enter into your browser, meaning the questions can be in any language too.

In order to facilitate this multi-language functionality each survey can have its own image to reflect region- or language-specific branding.

Question	Type	List Order	Show Only If	Question: Heading	Option: Sub-Heading	More Info URL	Mandatory
1. Является ли ваша установка Nissan или Toyota полной?	Single Option	1		Удовлетворенность клиентов обследования	--- N/A ---		<input type="checkbox"/>
2. Как бы вы оценили ваш общий опыт заказа?	Single Option	2		Удовлетворенность клиентов обследования	--- N/A ---		<input type="checkbox"/>
3. Reason for dissatisfaction	Multi Line Text	3		Удовлетворенность клиентов обследования	--- N/A ---		<input type="checkbox"/>
4. Насколько вы довольны тем, как ваша поставка была	Single Option	4		Удовлетворенность клиентов обследования	--- N/A ---		<input type="checkbox"/>
5. Reason for dissatisfaction	Multi Line Text	5		Удовлетворенность клиентов обследования	--- N/A ---		<input type="checkbox"/>
6. Please rate the installation engineer's overall performance	Single Option	6		Удовлетворенность клиентов обследования	--- N/A ---		<input type="checkbox"/>
7. Reason for dissatisfaction	Multi Line Text	7		Удовлетворенность клиентов обследования	--- N/A ---		<input type="checkbox"/>
8. Разве инсталлятор предоставит вам с быстрым демонст	Single Option	8		Удовлетворенность клиентов обследования	--- N/A ---		<input type="checkbox"/>

Удовлетворенность клиентов обследования

Customer Satisfaction Survey- Russian

Удовлетворенность клиентов обследования

1. Является ли ваша установка Nissan или Toyota полной?

- 1. да
- 2. нет

2. Как бы вы оценили ваш общий опыт заказа?

- отлично
- хорошо
- удовлетворительный
- плохой



Service Request Attachments Sent With Notifications

It is now possible to send attachments with notifications. Each attachment must be marked as available to be sent with notifications.

Ref No: 000137 | ClosedDeadline: 30 Mar 2014 11:13 AM

Status **Current Status is Finished** Team Projects | Consultant | Christine PM (0) | Moscow Nissan | Move

Service Request | Project | Surveys | Relates To | Schedule | Client Sign-Off | Attachments (1)

Live Task - '000137' Document Attachments

Files | Upload

Name	Description	Attached	CP U	CP CW	CP GW	Notifications
Help me please		31 Mar 2014 13:53:40	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Update

Attachment available to be sent with Email Notification

Select a page: 1 | Show All Pages | Show System Responses | Page 1 of 1

Date	Who	Description	Act Hrs	Doc No	Km	Response Type
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Furthermore, the notifications should be set to send the attachment(s), if you would like that notification to send the attachment(s).

Moscow Nissan | Delete | Save

Recipient: Reporting User (The User who logged the call)

Event: Customer Sign-Off to Started (Customer sign-off will send a satisfaction survey)

Occurs: 0 days, 0 hours, 1 minutes after the event *

Repeat Interval: 0 days, 0 hours, 0 minutes

Plaintext Template: Customer - Site Survey * | Copy | Paste

HTML Template: Customer - Site Survey | Copy | Paste

SSRS Attachment: Nissan Pre-Site-Survey

SSRS Attachment Format: pdf *

24/7

Attach all files marked as 'For Notification' on Live Task

Medium: Email

Delete | Save

Feel free to contact us if you would like help setting this up.

One Time Pin Sign-off on Service Request

One time pins can now be generated from the main Service Request. In the past this was only possible from the mobile interface. One time pins can be sent via email (with accompanying branding if required) or via SMS.

The screenshot displays a web application interface for managing service requests. A modal window titled "Sign-Off Process" is open, showing details for a service request with ID 000144. The modal includes sections for "Live Task Details", "Stock Details", and "Client Sign-Off Details". The "Client Sign-Off Details" section shows the contact person as Sylvie Rosco and the send medium as Email. A red arrow points from the "Client Sign-Off Created with Ref No 000028" entry in the response table to the modal.

Date	Who	Description	Act Hrs	No	RM	Response Type
02 Apr 2014 09:29:11	Admin Admin		00h00	n/a	0	Update
31 Mar 2014 22:58:32	Geoff Smith (Installer) Client Sign-Off Created with Ref No 000028	00h00	n/a	0	--None--
31 Mar 2014 22:58:07	Geoff Smith (Installer)	Performed installation as per checklist	00h00	n/a	0	--None--

Core

General Consistency Improvement

As always there are numerous consistency improvements in this release.