





Pulse Release Notes – 14.04


Watershed Items

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



Service

-  Rich Text Emails Off the Service Request
-  Create Copy of a Service Request for all Child Clients

Financials

-  Call Billing Inside Pulse

Client Portal

-  Please note that as of the 14.04 release, the old Client Side is no longer available
-  Various Security Improvements on the Contact Person

Service



Rich Text Emails off the Service Request

Using the email functionality from the Service Request, it is now possible to send rich text (formatted) emails to your customers. These include all the original functionality such as replace labels, attachments and templates.

To: demo1@pulse-software.co.uk

Cc:

Bcc:

Attachments:

Template: Reporting User Contact.rte

Subject: Re: I cant re-open my closed ticket Ref 37346

Message

Dear Joe Smith

This is an update on Service Request [37346](#)

Title: I cant re-open my closed ticket

Description: Please help - I accidentally closed ticket BLE009 and need to re-open it. However, it does not have a status drop down and I cant seem to change the status in any way.

Reporting Date: 05/05/2014 09:38:17

Tickets made from projects cannot be re-opened as closing them causes other processes, such as tickets made off dependancies, to happen. You can, however, link another ticket to the project so that the work is still recorded there.

Regards,

Pulse Business Software

p

Words: 94

Email will be sent to (demo1@pulse-software.co.uk)

Templates are set up in a similar screen. This is under “Service Request Email Rich Text Templates” under “Incident Files” on the Service tab.



Create Copy of a Service Request for all Child Clients

Pulse is able to propagate copies of a Service Request to all clients. Some of our users have requested this be refined so that Service Requests can be propagated to the child clients of the current client. Let us know if you’d like us to turn on this functionality for you.

Show All Service Requests					Show All Pages
Description	Assigned	Status	Urgency	Customer Invoice	Propagate
Arrange a visit for all branches to find out where we can improve service.	Keith Norris	Unaddressed			Propagate to Child Clients
Please help - I accidentally closed ticket BLE009 and need to re-open it. However, it does not have a	Keith Norris	Assigned			Propagate to Child Clients

Scheduler Remembers Consultant's Filter

The filters chosen on the scheduler are now remembered per consultant. This helps schedulers who are typically only working with a select group of staff-members at any one time.

Display Details for: Team - Not Selected - or Project Consultant Role Technical

Layer Details

Events

- Show Events
- Show Cancelled Events
- Show Event Description
- Show Attendance
- Show Calendar Integration Events

Tasks

- Scheduled
- UnScheduled

5 - 11 May 2014	5 Mon	6 Tue	7 Wed
Consultant			
Technical			
Ashleigh Coetzee			
Chris Green			
Craig Mitchell			
Stefan Henrico			
Tyrone Williams			
Vaughn Cleminson			

Financials



Call Billing

For companies reselling fixed and mobile line access: Pulse is now able to import your supplier call logs and process them into individual customer and supplier invoices. The imported csv files can be of the format supplied by the operator. These are then mapped to the required fields in Pulse, and once approved the invoices are created.

Calls Made by Customer - /riaan house from '03 May 2014' to '05 May 2014'

Call Bill Date: 02 May 2014

Workflow: Assigned: - Please Select -; Approved: ; Checked: ; Invoice Line Items Made No:

Relates To: Client: /riaan house; Contract: --- N/A ---; Calls From: 03 May 2014; Calls To: 05 May 2014; Link to Invoice: *Create New Invoice*; Period:

Page 1 of 1 | Apply to Column: Checked | for the: Current Page | Apply

Call No	Call Date	Call Time	Originated At Site	Origin	Destination	Charge Group Name	Time Band Name	Day/Eve/W-End	Call Charge Group	Duration	Duration In Seconds	Checked	Client Query	Free Call	Delete from Client Bill
31	03 May 2014	10:54	riaan house	01666840187	07717194712	UKMobile	Peak			1:04:45	3885	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32	05 May 2014	11:54	riaan house	01666840187	07717194712	UKMobile	OffPeak			2:04:45	7485	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33	05 May 2014	11:54	riaan house	01666840187	07717194712	UKLandline	OffPeak			00:04:45	285	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Page 1 of 1 | Save

Purchase Order Templates Enforce Selection

The default behaviour for PO templates is for one template to be chosen as the default. If you would prefer the PO to not default, and enforce selection by the consultant, please let us know.

Purchase Order - Test Supplier

Document Number: 1379 | Delivery/Fulfillment Date: 04 Mar 2014 | Document Date: 28 Feb 2014 | Required Date:

Subject: Test test

Workflow: by Admin Admin; Assigned To: Admin Admin (Approval up to £1000.00); Status: Open; Sales Consultant: Admin Admin (Approval up to £1000.00); Approved: ; Sent:

Revision Number: 3 | Make Supplier Invoice from this Purchase Order | View Audit History | View GRNs | Create new SO from this PO

Financial | Relates To | Custom Fields | Supplier | Sender | Delivery

Incident: | Unlink

Project: | Unlink * @

Customer Client: | Clear

Client Contract: *Not Set* *

Order No:

Supplier Ref:

Template: - Select - *

Sales Order:

Projects

Project Transaction Currencies Can be Changed

Project transaction currencies are occasionally created in the wrong currency if the incorrect currency account is set on the client. There is now a tool to change these for users with the correct access level. This can be found under the “Change Project Currency” on the Projects tab of the setup menu.

Search for a Project below

Project

Project Details

Ref No	000001599	Status	Not started
Project Name	Happy Harry's Toy Shop (TEST) [000-Generic]		
Description			
Currency	Canadian Dollar	Exchange Rate	0.6

Below is a list of Budget Transactions of Type (Bill On Task Complete) found for this Project

Change the Project Currency Details to a different Currency Below

New Currency	Rate
<input type="text" value="- Don't change Currency -"/>	
<input type="text" value="Euro"/>	
<input type="text" value="US Dollar"/>	
<input type="text" value="Pound"/>	
<input type="text" value="Norwegian Krone"/>	

Original End Date

When a project is first put into an active status (e.g. started) it is time-stamped with the projected end date at that time. This data is available for reporting, so that it is possible to determine whether the project has finished on time or not.

Client Portal



Security and Usability Improvements Around Contact Person Passwords

The old client side is no longer available as of Release 14.04. Your users will be presented with an explanation and a document outlining how the new client portal works.

We have made a number of improvements to Contact Person login credentials. Part of this involves passing them through the same engine that deals with Consultant passwords, with the result that it is no longer possible to decrypt them and present them to Pulse users.

The same password strength and complexity rules are applied as for consultants. In addition, the mandatory length is set to 8 characters, but this is configurable.

It is also possible to force the user to change their password on the next login.

A new button will generate a random compliant password, and this can be set to be the only option in both the Pulse application and Client Portal.

The screenshot shows the 'Add/Update Contact Person Details' form in a web application. The form includes fields for Contact Role, Title, FirstName (Joe), Surname (Smith), ID Number, Birth Date, Telephone (+27 11 781 1158), Mobile Number, Email (demo1@pulse-software.co.uk), and Client (TEST CLIENT). Below these are tabs for Roles, Messages, Employment, Custom Fields, and Attachments. A 'Buy Role' dropdown and 'Language' dropdown (set to English) are also visible. The 'UserId' field contains 'Joe Change Credentials'. A red arrow points from this field to a 'Change Password' dialog box. The dialog box has a title bar with a close button and contains the following fields: 'Change credentials for Joe Smith' with a 'Save' button; 'UserId' (Joe) with a 'Generate Random Password' button; 'New password' and 'Confirm new Password' text boxes; and a checkbox for 'Must change password at next login' with a 'Save' button.

Change Password ✖

Change credentials for **Joe Smith** Save

UserId

Password will be set to: +4_jBP&?

New password

Confirm new Password

Must change password at next login

Welcome Joe Smith

CLIENT SEARCH

Include Children

All

Mine

[Home](#)

YOUR PASSWORD HAS EXPIRED, PLEASE CAPTURE A NEW ONE.

Password must be at least 8 characters
 Password must contain a capital letter, lower case letter, special character and a number.

User ID Joe **Password**

Confirm new Password

Core

General Consistency Improvement

As always there are numerous small consistency and usability improvements in this release.