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

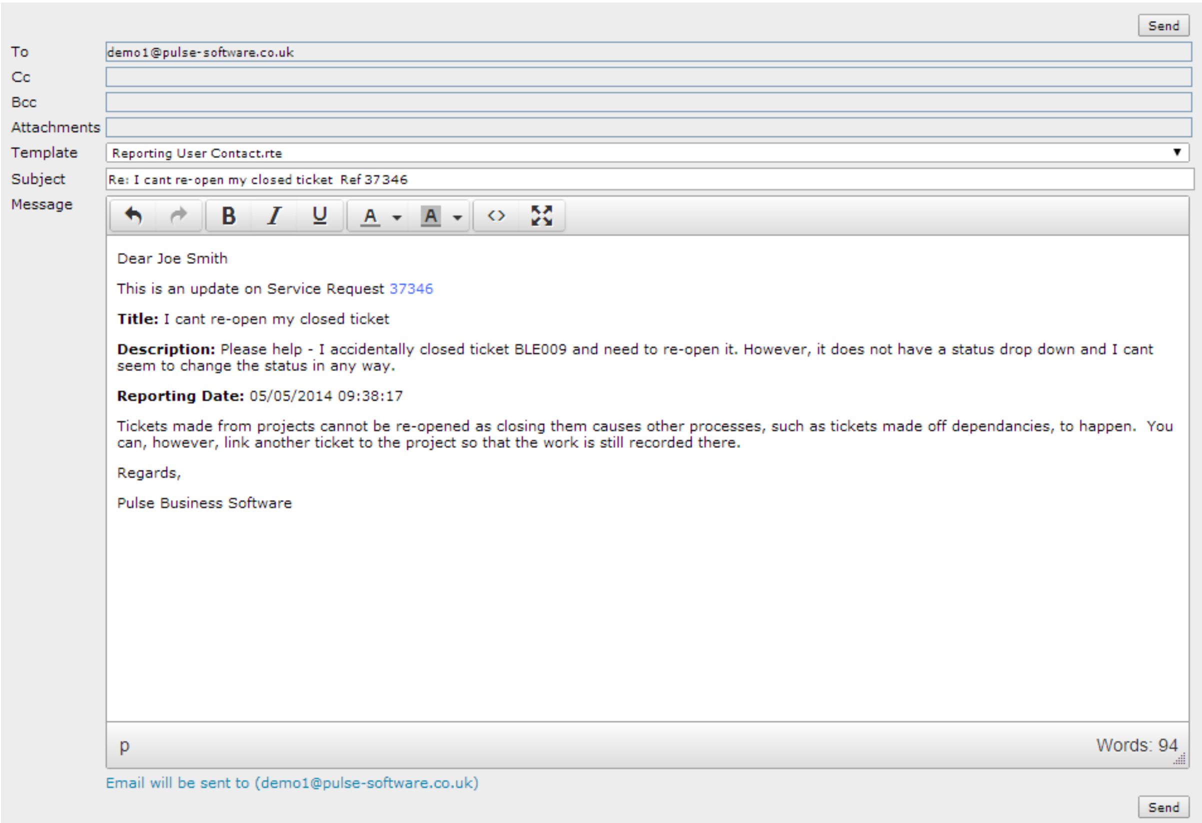
Client Portal

- 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

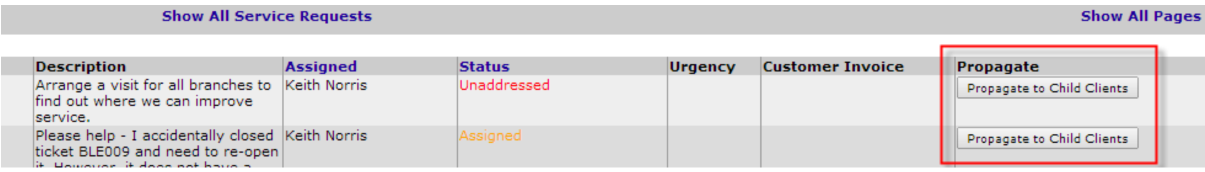
Using the email functionality from the Service Request, it is now possible to send rich text (formatted) emails to your customers. These include all the original functionality such as replace labels, attachments and templates.



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

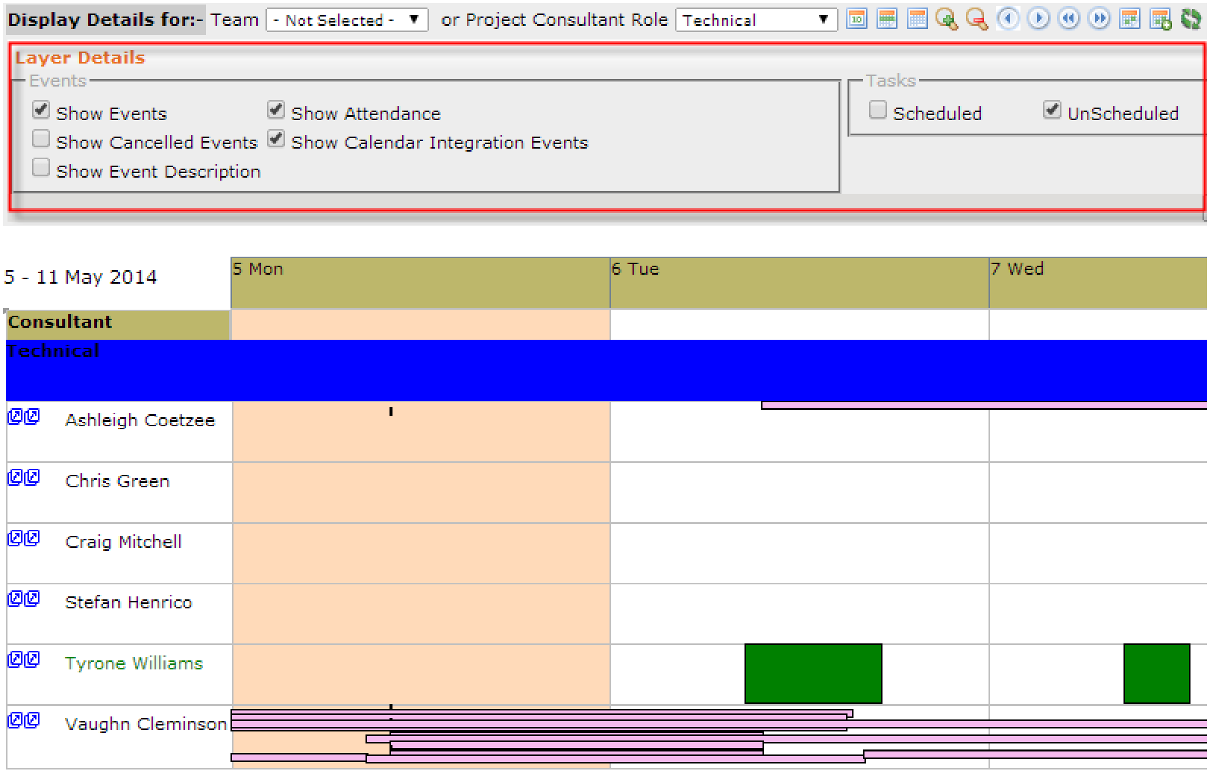
Create Copy of a Service Request for all Child Clients

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.



Scheduler Remembers Consultant's Filter

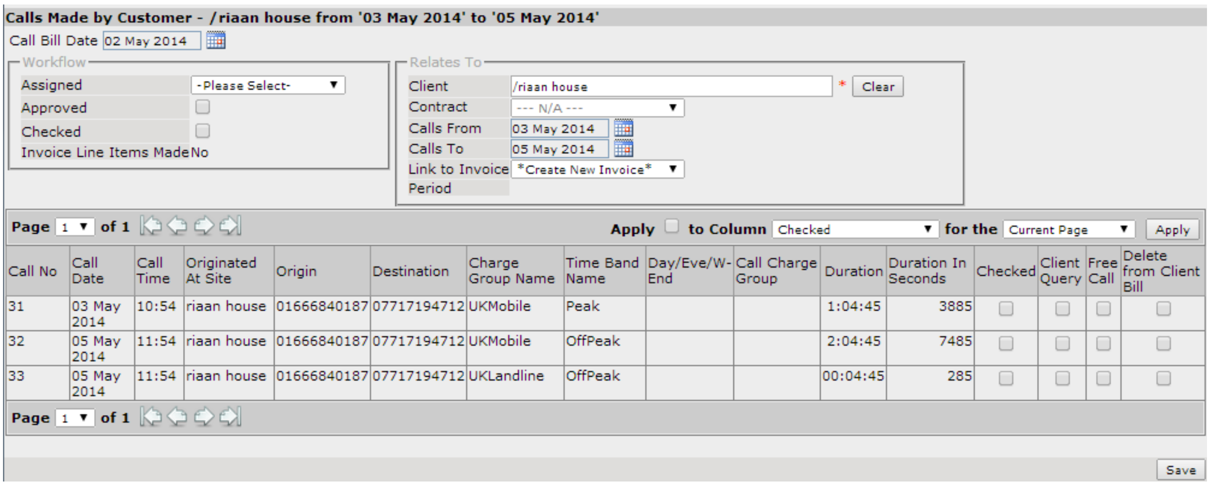
The filters chosen on the scheduler are now remembered per consultant. This helps schedulers who are typically only working with a select group of staff-members at any one time.



Financials

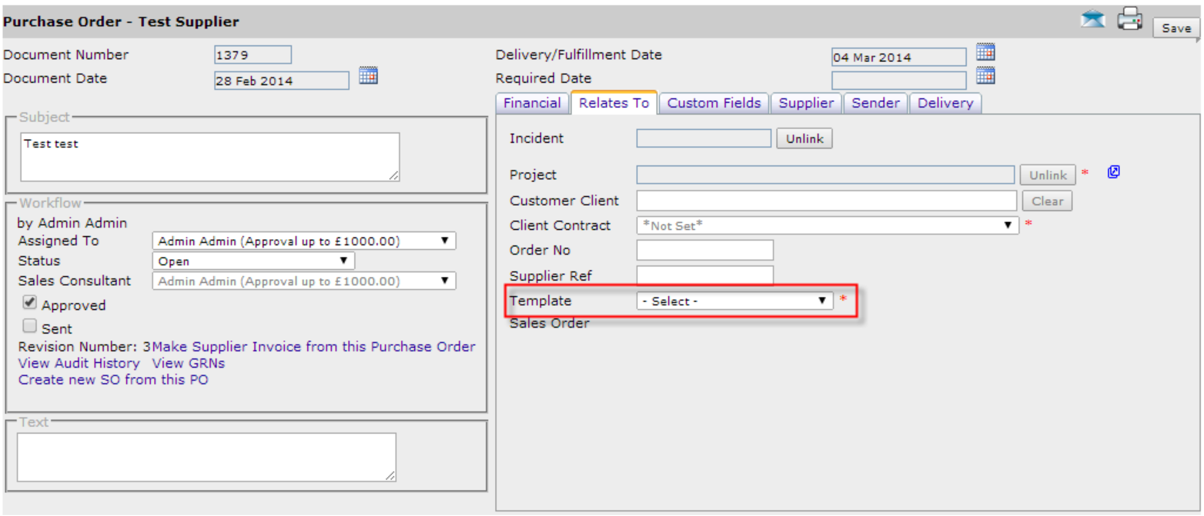
Call Billing

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.



Purchase Order Templates Enforce Selection

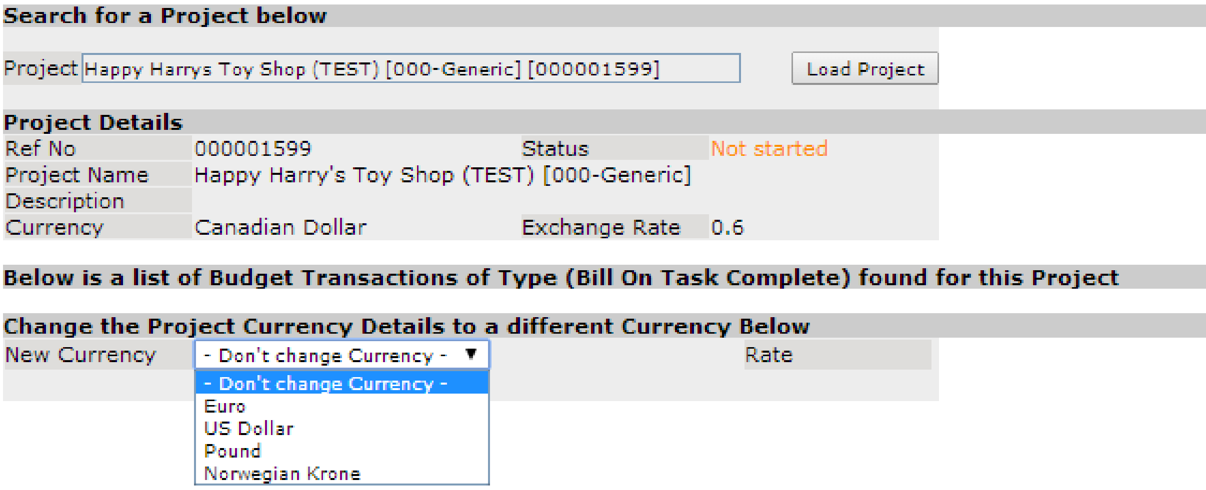
The default behaviour for PO templates is for one template to be chosen as the default. If you would prefer the PO to not default, and enforce selection by the consultant, please let us know.



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.



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

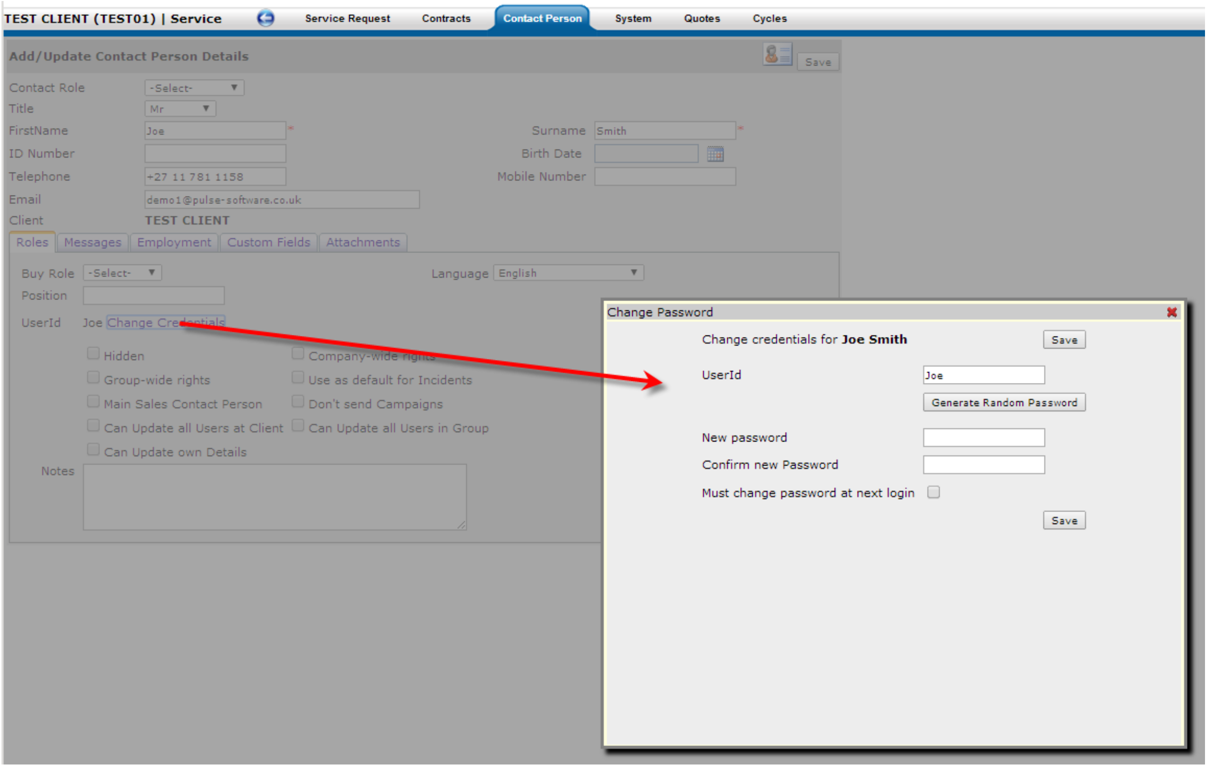
The old client side is no longer available as of Release 14.04. Your users will be presented with an explanation and a document outlining how the new client portal works.

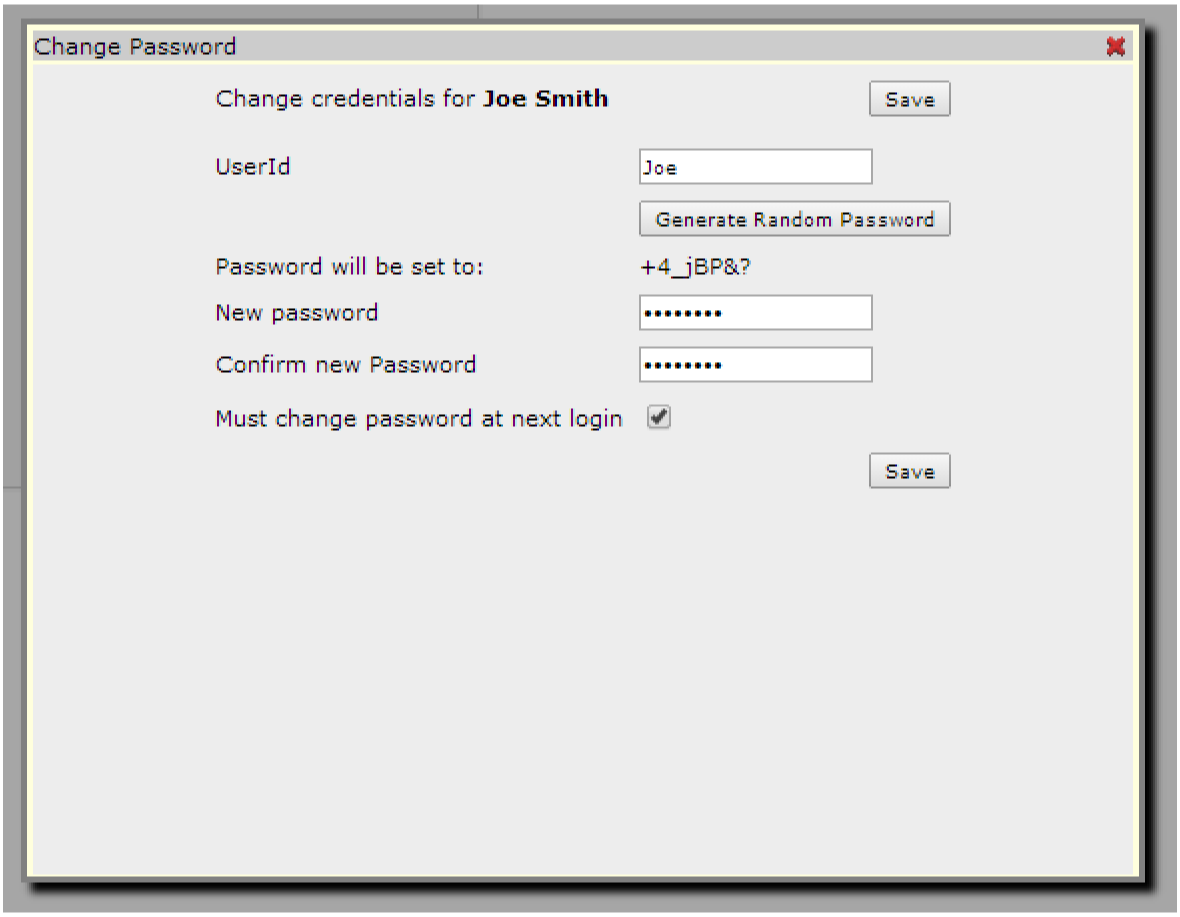
We have made a number of improvements to Contact Person login credentials. Part of this involves passing them through the same engine that deals with Consultant passwords, with the result that it is no longer possible to decrypt them and present them to Pulse users.

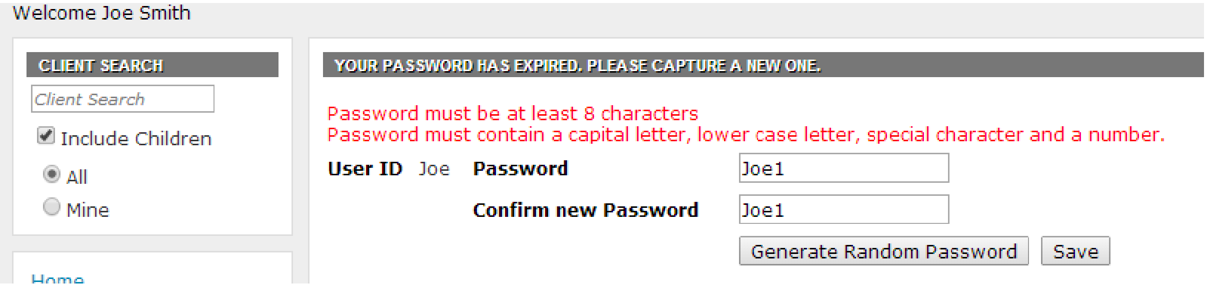
The same password strength and complexity rules are applied as for consultants. In addition, the mandatory length is set to 8 characters, but this is configurable.

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.







Core

General Consistency Improvement

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