Pulse 15.02 FAQ

What's this all about then?

The 15.02 release of Pulse brings an all-new look and feel that delivers improvements in consistency and usability across a range of devices. The general layout remains the same, with a top menu area, left tool bar with scoreboards, and central work area. However, some items have moved and a lot of work has gone into creating a consistent experience so that you know exactly how to use a page, even if you've never seen it before.

A project of this size has to be done in stages, and we're not done yet. But the fundamentals are in place and you will continue to see improvements rolling out across all interfaces in the coming weeks and months.

This document serves to introduce you to the most important changes and give you an idea of where we are headed with this project.
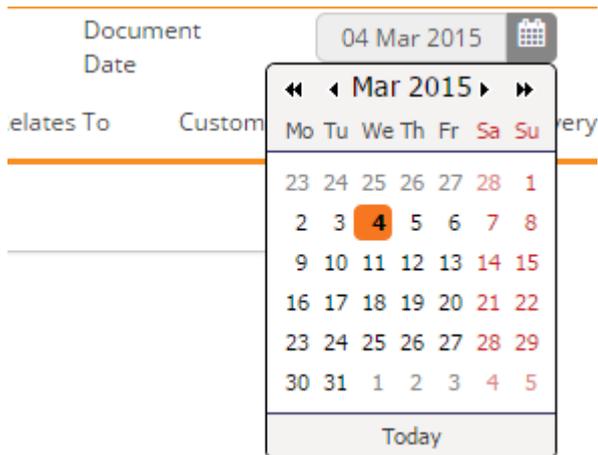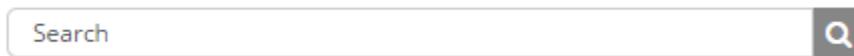
What are the general changes I should know about?

- Buttons and other controls have colours that relate to their functions. Green is save, blue is do or go to, red is an error or something to be careful with (think void or delete).

- Buttons relating to text boxes are replaced by input groups that save space and introduce a modern look.
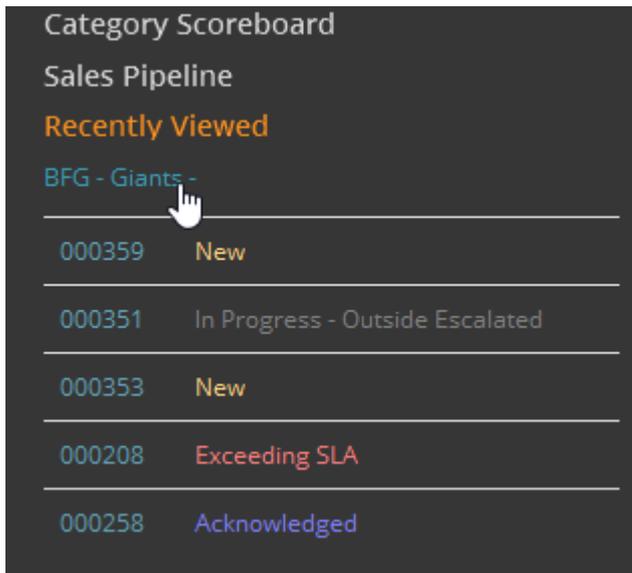
Help, how do I...

- ...logout?

Click the logout icon in the top menu bar.

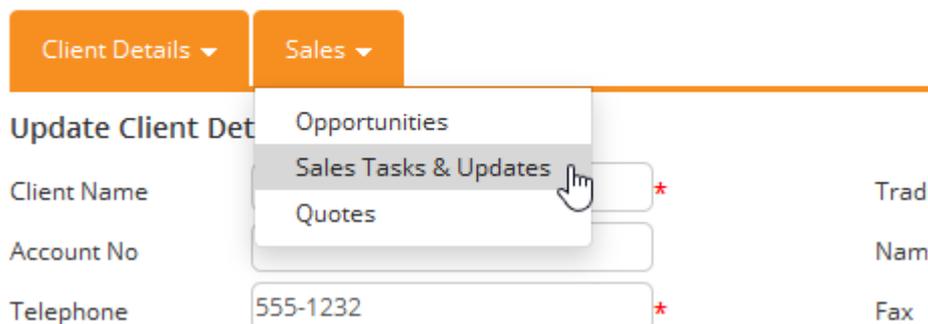- ...access the most recently viewed client?

We have moved the current client link to the Recently Viewed left toolbar scoreboard.


- ...navigate the client menu?

The client menu no longer has a multi-level structure. Simply click the relevant tab, and choose the item you need.
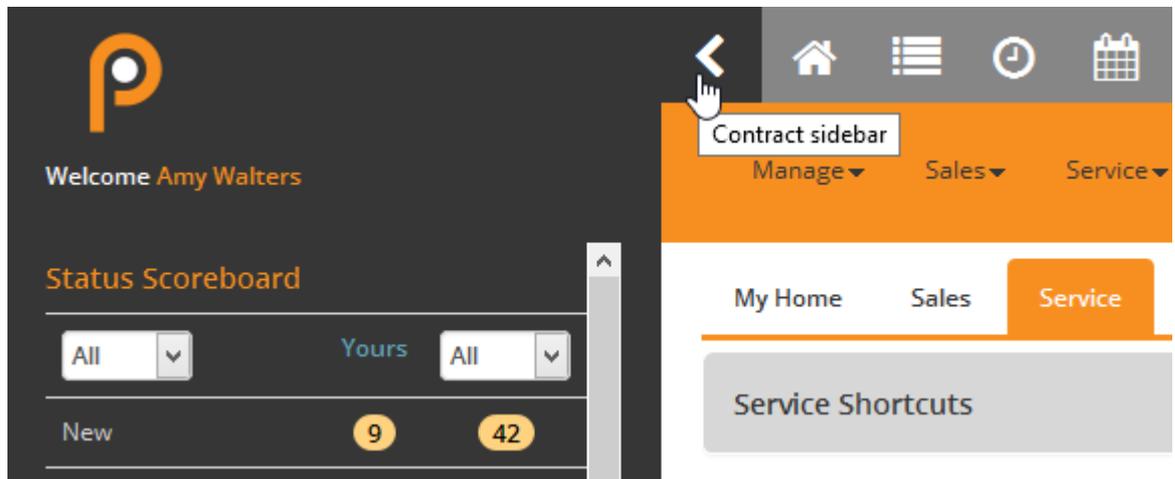
- ...scroll the front page dashlets horizontally?

Front page dashlets automatically grow to the size of their contents. This can mean that the horizontal scroll bar is not visible, so we have created a Pulse scroller that is always visible when required on the front page.
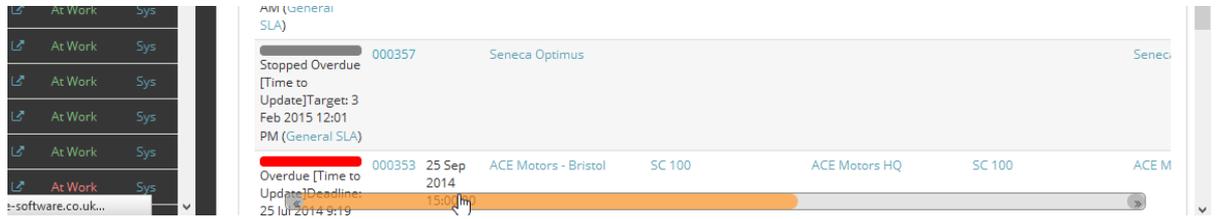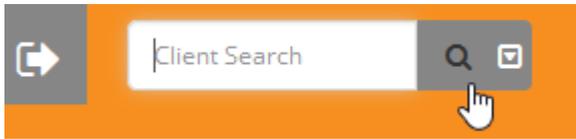

- ...collapse the left toolbar?

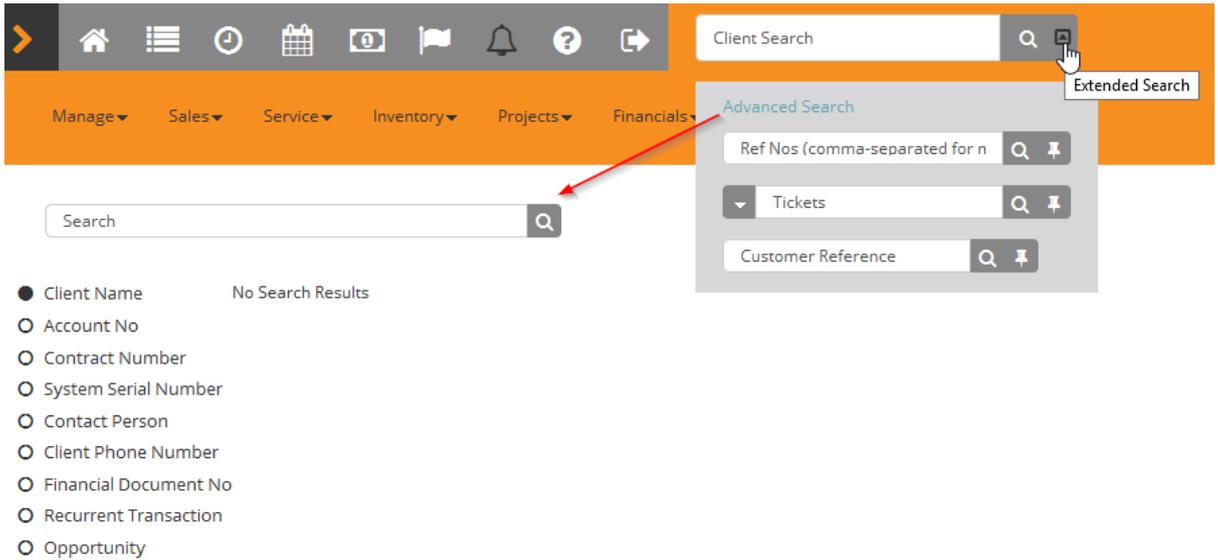Click the chevron in the top menu bar.

- ...search for something?

We have moved all the searches to the top menu bar where you are used to seeing the client search. Searching for clients remains the same.


All searches have been moved to the Extended Search accessed from menu attached to the client search. The Advanced Search link loads the advanced search in the main area.

The multi-search drop down selection can be accessed from the button attached to the left of the textbox.
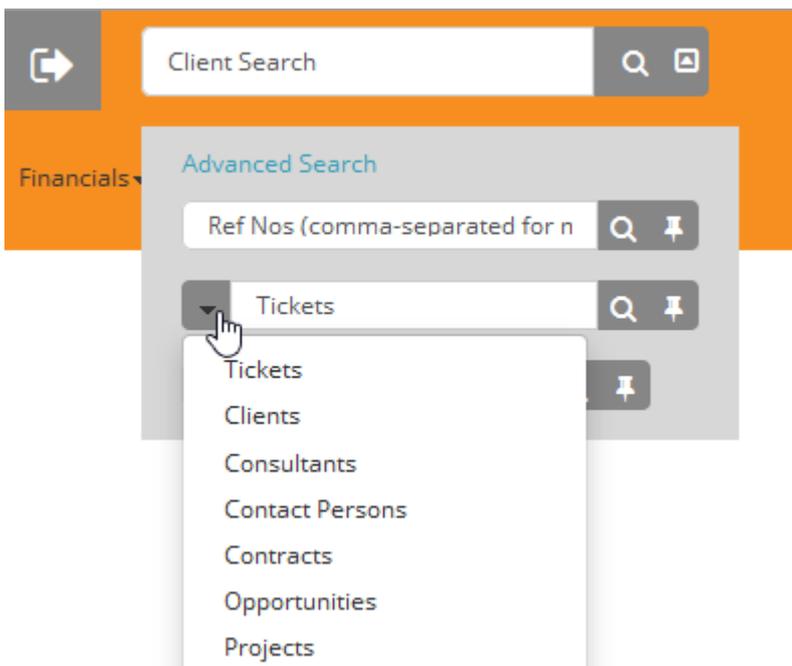
We have made it possible to pin your most commonly used search to the right of the client search.
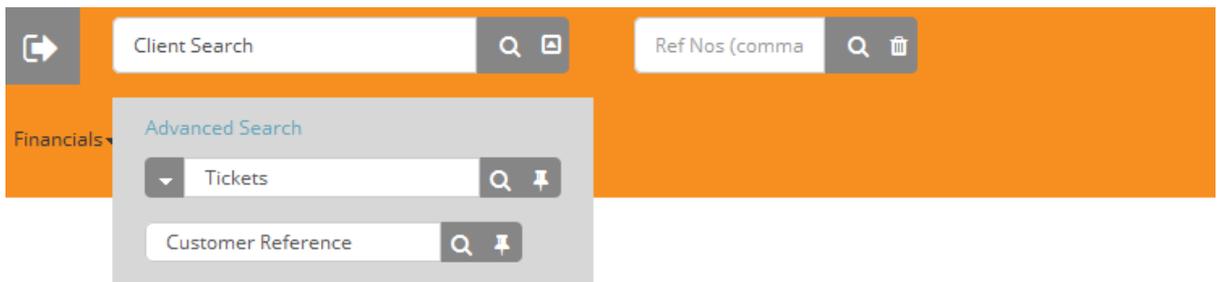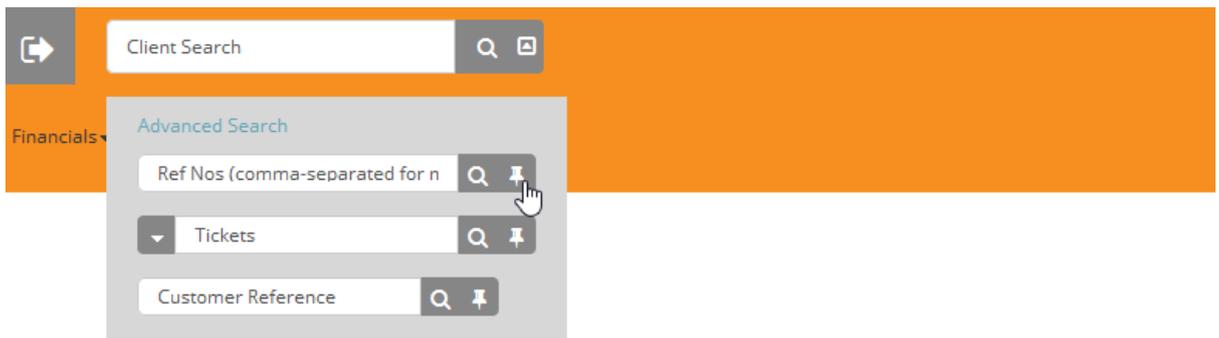
- …edit responses

Responses now load in a read-only format in order to display more above the fold. If you have security clearance to edit responses, click the Edit icon to enable editing

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Where is my…

- …most recently viewed client link?
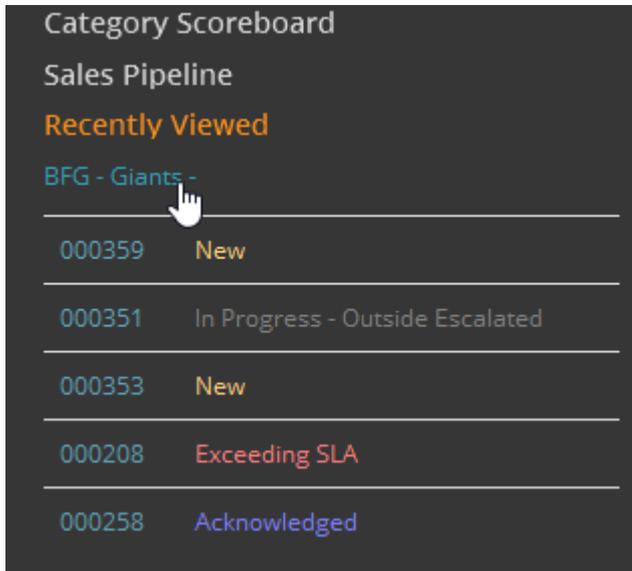 We have moved the current client link to the Recently Viewed left toolbar scoreboard.

- …*File* menu item?
  To prevent confusion from the duplication we have removed the menu item. All of the actions can be accessed from the top icons (see below).

- …*Edit* menu item?
  We have renamed the Edit menu item as *Manage*. This more accurately reflects the tasks that can be accomplished from this menu item.
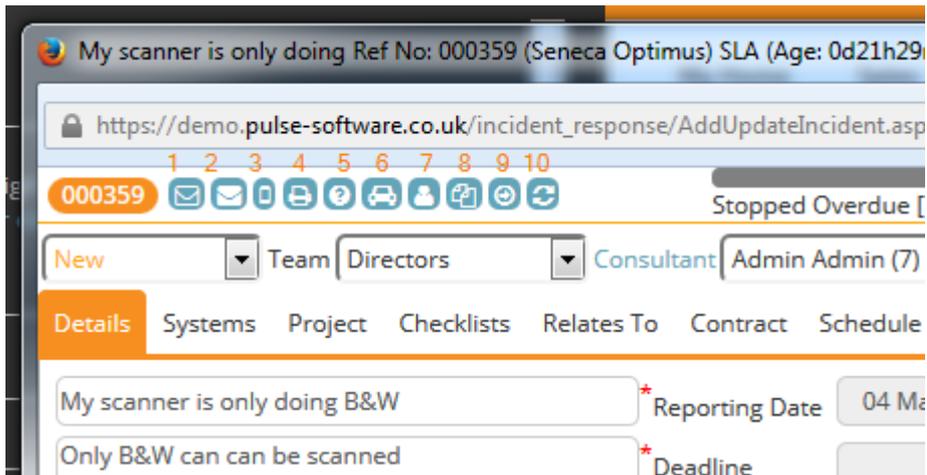
What does this icon do?

- Top menu bar


1) Collapse left toolbar
2) Load your home screen
3) Service Grid
4) Timesheet
5) Visual Scheduler
6) Log a new opportunity
7) Log a new quick service ticket
8) Popup notification indicator
9) Log into our client portal to log new tickets and view existing ones
10) Log out of Pulse

- Ticket icons

1) Send an email from your email program relating to this ticket
2) Send an email from Pulse relating to this ticket
3) Send an sms/text message relating to this ticket
4) View the printer-friendly detail view of this ticket
5) Make a knowledge base article from this ticket
6) Make an extension copy of this ticket
7) View and work with outside escalations relating to this ticket
8) Make a copy of this ticket
9) Show client details
10) Refresh the ticket form

- Dashlets
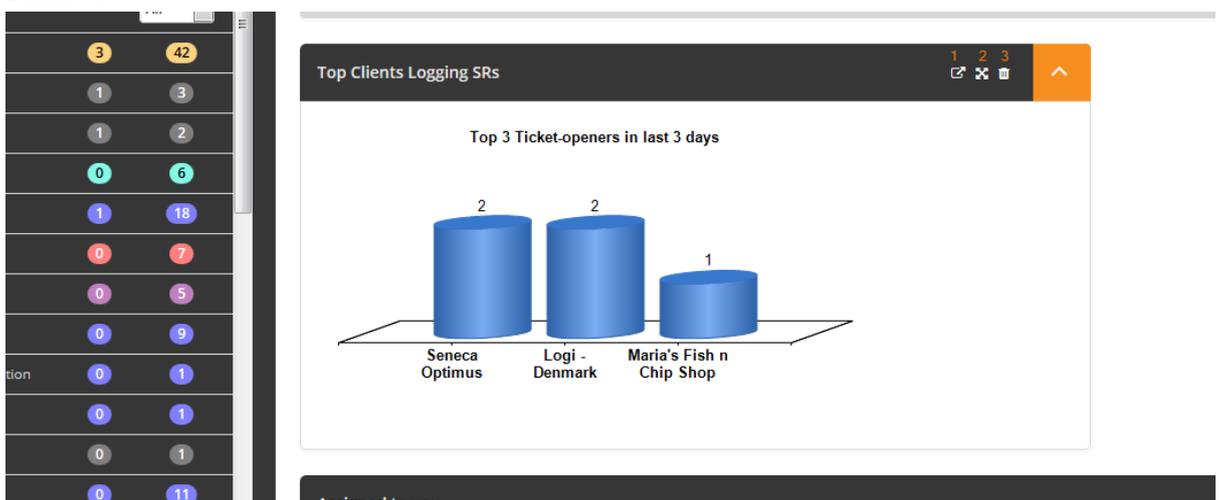
1) Open dashlet in its own tab or window
2) Expand dashlet to take the full area available
3) Remove dashlet from your front page. You can always add it again from the setup tab

Other questions...

- What about the client portal - will this also change?
  The client portal that your customers access will not change in any way at this time.

- I like my Pulse the way it is. Can't I just keep it?
  The 14.10 release was the last version of Pulse to use the old skin. While we are committed to supporting this release and fixing any issues found, no new functionality will be built into the old look and feel. We strongly recommend upgrading to continue to benefit from future improvements.

- So why should I upgrade?
  Pulse 15.02 is responsive, modern, consistent, easier to use, more intuitive and includes new functionality such as pinned searches, notification indications, and improved dashlets.

- Apart from the above, what new functionality can I expect in 15.02?
  Please see the release notes for the full list of new functionality available:
  http://www.pulse-software.co.uk/wp-content/uploads/2015/03/Pulse-Release-Notes-15.02.pdf

- Can I leave any feedback?
  Of course! We'd love to hear your thoughts on the new skin, and suggestions for future improvements. Please feel free to contact us on support@pulse-software.co.uk.
  We will also be sending you a survey after you have been upgraded, allowing you to give us feedback.