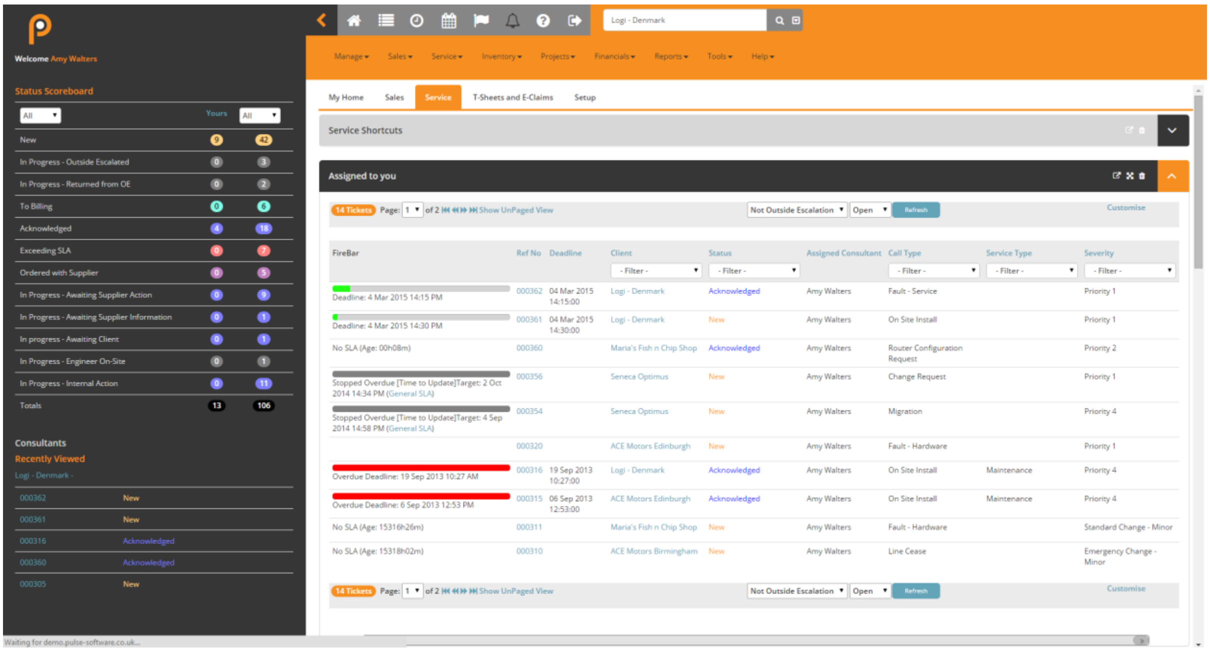
Pulse Release Notes – 15.02



Pulse 15.02 introduces our exciting new look and feel. Along with the items outlined below we have worked hard on the user interface to make it more intuitive and consistent.

As with any project of this size there are important changes that you should be aware of. Please also view our 15.02 Frequently Asked Questions to guide you through the new interface: http://www.pulse-software.co.uk/wp-content/uploads/2015/03/Pulse-15.02-Frequently-Asked-Questions-FAQ.pdf

Watershed Items

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

Projects

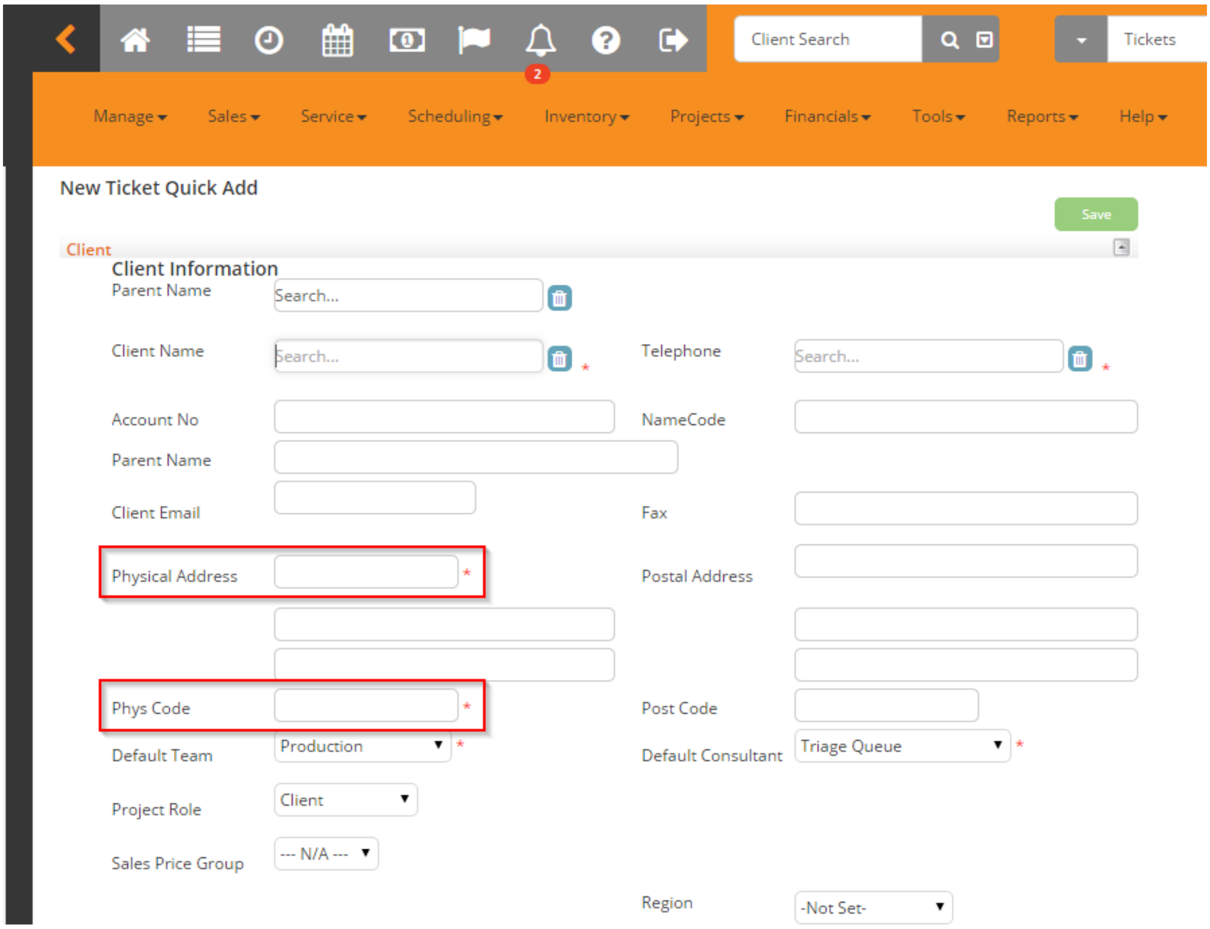
- Link template projects to clients so that they are only available for those clients and their children

Core

- Contact Person custom field encryption with audits of viewing and changing
- Copy consultant tool to make it easier to add new consultants
- Autosuggesting reports and dashboards that may be useful

Service

Physical address and physical postal code can be set as mandatory on the quick add form
If you would like us to set these fields to be mandatory on the quick add form please let us know.

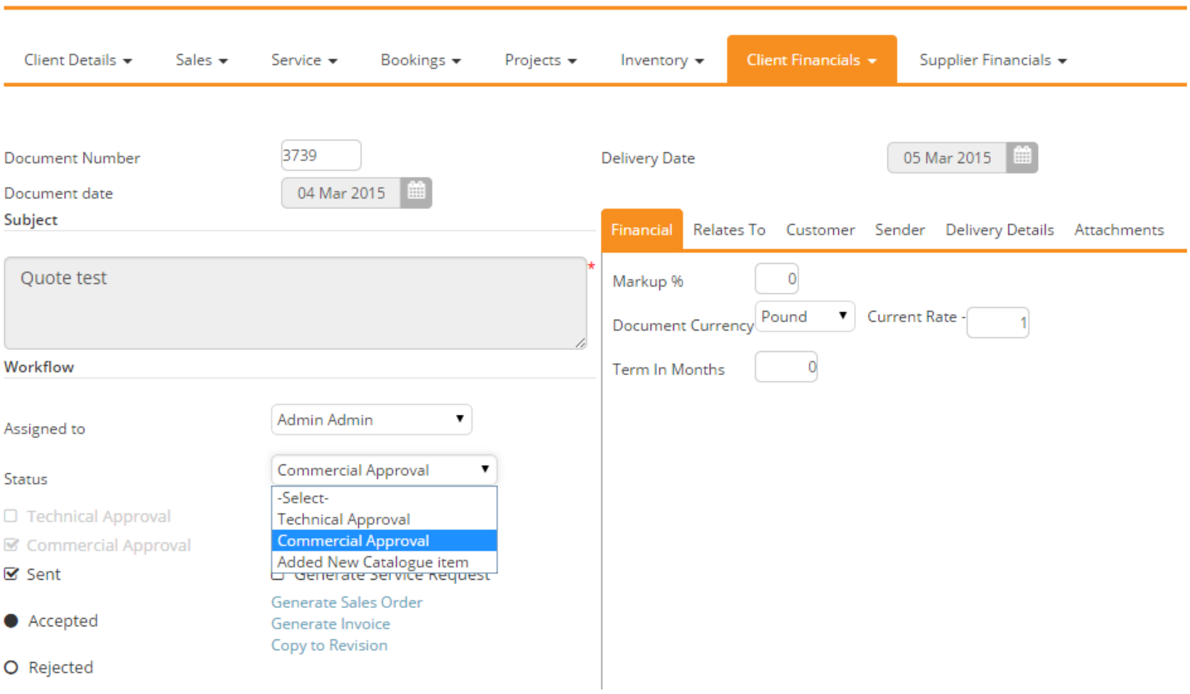


Financials

Quote statuses linked to tickboxes

Advanced quotes can now have statuses, which can further be linked to existing checkboxes on the quote. This allows for greater fidelity in workflow, and can be used along with reporting and emailed notifications of statuses.

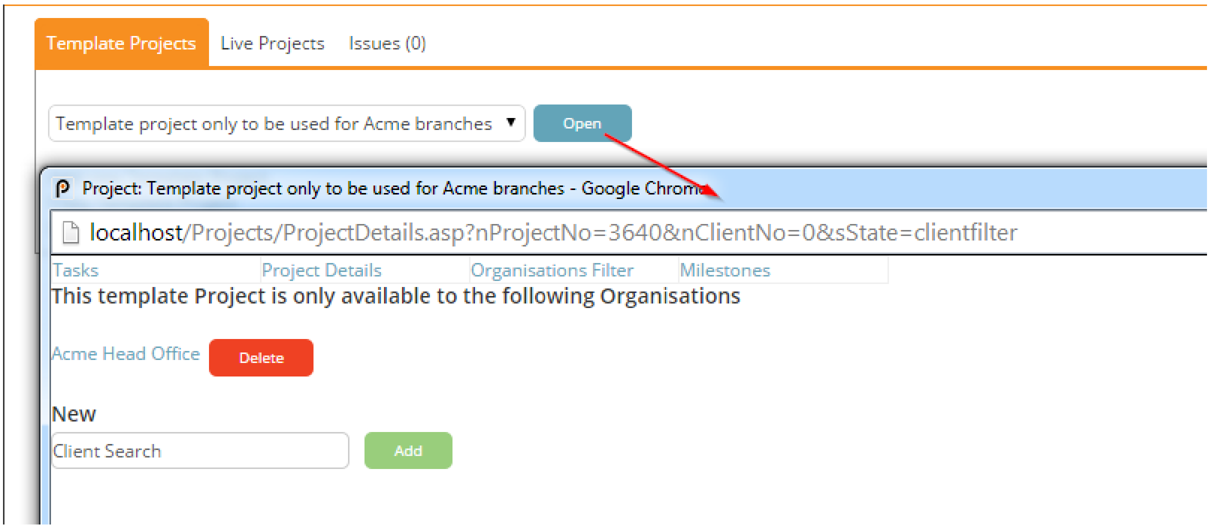
Let us know if you'd like to set up status on quotes.

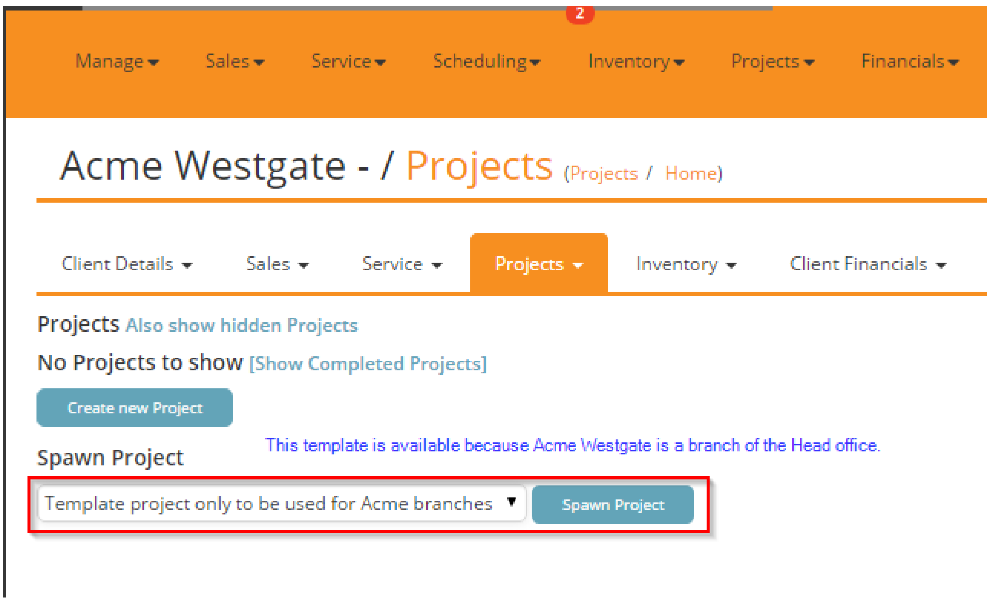


Projects

Link template projects to clients so that they are only available for those clients and their children
Template projects can now be linked to clients within Pulse. If a template project is linked to a client then it is only available for spawning of live projects from that client, and its children, grandchildren etc.

If the template is not linked to a client then it is available to all clients.



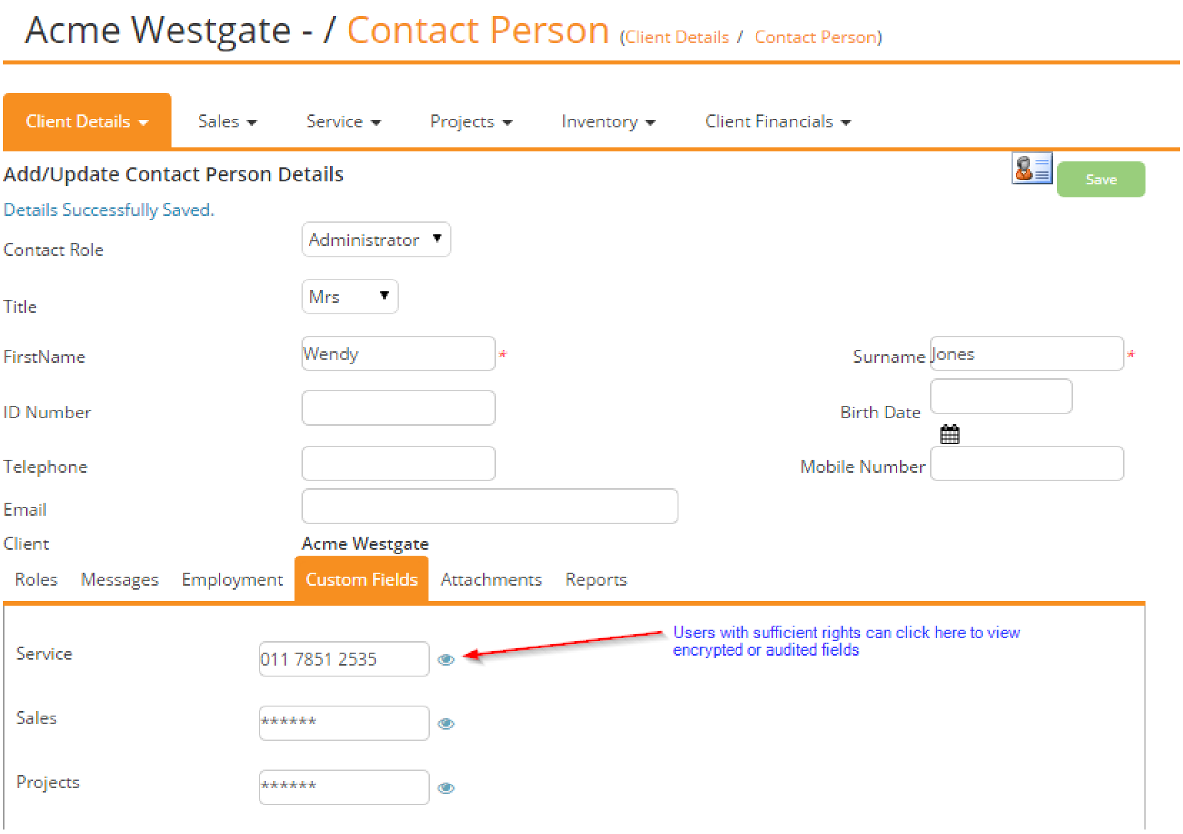


Core

Contact Person custom field encryption with audits of viewing and changing
A variety of personal information might be considered confidential. With this in mind, any text custom field on a contact person can be set to be encrypted. Furthermore, Pulse can audit any viewing and saving of the custom field.

The usual security around custom fields still applies.

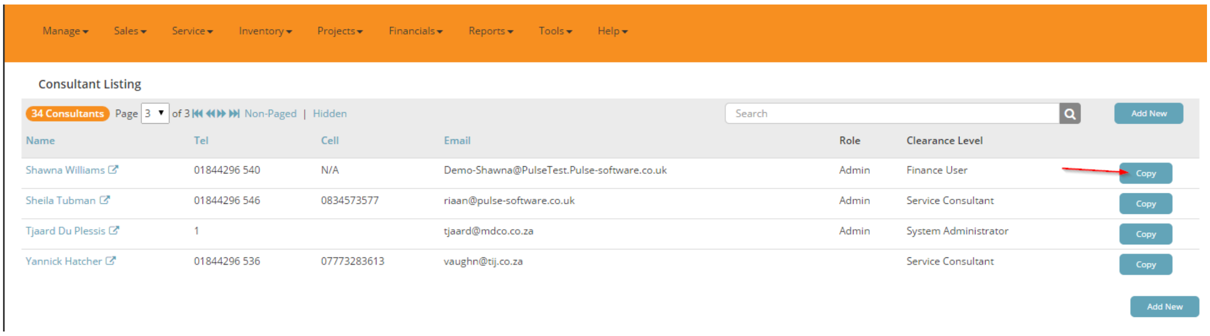
Let us know if you would like help setting up encryption and auditing of custom fields on contact people.



Copy Consultant Tool

When adding a new staff member to your Pulse application you usually have some idea of what sort of access they should have. Often, this is based on existing staff members – for instance, all call centre personnel are likely to require the same access.

The new Copy functionality allows you to quickly create new consultants based on the settings of others.



Autosuggest dashlets

Pulse has many dashlet and reports that are useful to our users. However, it has not been easy to know what they are.

In 15.02 we are introducing auto-suggesting dashlets – a section where the top dashlet are available, with a screenshot, based on the modules that you use. You can add them straight from the suggestion tab, or clear them to not be suggested again.