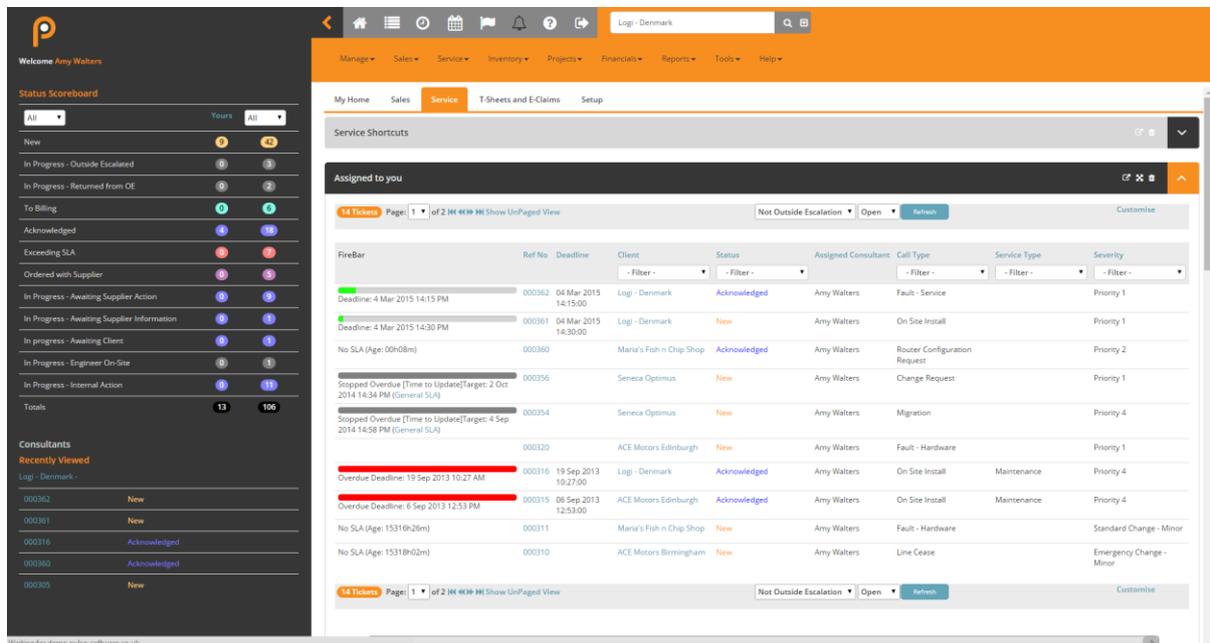




Pulse Release Notes – 15.02



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.

New Ticket Quick Add Save

Client

Client Information

Parent Name

Client Name *

Telephone *

Account No

NameCode

Parent Name

Client Email

Fax

Physical Address *

Postal Address

Phys Code *

Post Code

Default Team *

Default Consultant *

Project Role

Sales Price Group

Region

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.

Client Details ▾ Sales ▾ Service ▾ Bookings ▾ Projects ▾ Inventory ▾ **Client Financials ▾** Supplier Financials ▾

Document Number Delivery Date

Document date

Subject

Financial Relates To Customer Sender Delivery Details Attachments

Markup %

Document Currency Current Rate -

Term In Months

Workflow

Assigned to

Status

Technical Approval

Commercial Approval

Sent

Accepted

Rejected

Added New Catalogue item

Generate Service Request

[Generate Sales Order](#)

[Generate Invoice](#)

[Copy to Revision](#)

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.

The screenshot shows the Pulse interface with the 'Template Projects' tab selected. A dropdown menu is open, showing 'Template project only to be used for Acme branches' with an 'Open' button next to it. A red arrow points to the 'Open' button. Below this, a browser window is open to 'localhost/Projects/ProjectDetails.asp?nProjectNo=3640&nClientNo=0&sState=clientfilter'. The page title is 'Project: Template project only to be used for Acme branches - Google Chrome'. The page content shows 'This template Project is only available to the following Organisations' with a list containing 'Acme Head Office' and a 'Delete' button. Below this is a 'New' section with a 'Client Search' input field and an 'Add' button.

The screenshot shows the Pulse interface with the 'Projects' tab selected. The page title is 'Acme Westgate - / Projects (Projects / Home)'. Below this, there is a navigation bar with 'Client Details', 'Sales', 'Service', 'Projects', 'Inventory', and 'Client Financials'. The 'Projects' tab is active. The page content shows 'Projects Also show hidden Projects' and 'No Projects to show [Show Completed Projects]'. There is a 'Create new Project' button. Below this, there is a 'Spawn Project' section with a blue link: 'This template is available because Acme Westgate is a branch of the Head office.' Below the link is a dropdown menu with 'Template project only to be used for Acme branches' and a 'Spawn Project' button. A red box highlights the dropdown menu and the 'Spawn Project' button.

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.

Acme Westgate - / Contact Person (Client Details / Contact Person)

Client Details ▾ Sales ▾ Service ▾ Projects ▾ Inventory ▾ Client Financials ▾

Add/Update Contact Person Details Save

Details Successfully Saved.

Contact Role: Administrator ▾

Title: Mrs ▾

FirstName: Wendy * Surname: Jones *

ID Number: Birth Date:

Telephone: Mobile Number:

Email:

Client: Acme Westgate

Roles Messages Employment **Custom Fields** Attachments Reports

Service	<input type="text" value="011 7851 2535"/>	
Sales	<input type="text" value="*****"/>	
Projects	<input type="text" value="*****"/>	

Users with sufficient rights can click here to view encrypted or audited fields



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.

Name	Tel	Cell	Email	Role	Clearance Level	
Shawna Williams	01844296 540	N/A	Demo-Shawna@PulseTest.Pulse-software.co.uk	Admin	Finance User	Copy
Sheila Tubman	01844296 546	0834573577	riaan@pulse-software.co.uk	Admin	Service Consultant	Copy
Tjaard Du Plessis	1		tjaard@mdco.co.za	Admin	System Administrator	Copy
Yannick Hatcher	01844296 536	07773283613	vaughn@tj.co.za		Service Consultant	Copy



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.

Reported	Ref	Title	Status	Assigned To	
		Most Recent Important SRs			<input type="radio"/> Yes, add to my home screen <input type="radio"/> No <input type="radio"/> Not right now