



Pulse Release Notes – 15.08

Watershed Items

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

Service

-  GPS coordinates of consultants recorded on login and responses
-  Built-in editor for HTML email templates

Financials

-  Sales order costing improvements

Client Portal

-  Client portal knowledge base / document repository

Core

-  Improved remote monitoring of your Pulse system

Service



GPS coordinates of consultants recorded on login and responses

Do you need to know where your staff are when they login or make a response on a service request? Perhaps you have to reassure your customers that they were on site for the billed period, or you need to know where they are to help with scheduling the next job.

Pulse now records the location of the consultant on login and making responses. This data is available as a Google Earth view as well as in raw form.

This new functionality is available in the main application and mobile interface. The mobile apps will be updated in due course.

The screenshot displays a Google Earth map of Johannesburg, South Africa, with several location markers. Three specific markers are highlighted with text boxes:

- 28 Aug 2015 15:08:22 by Zanele Mthembu, Status: Closed
- 28 Aug 2015 14:34:25 by Zanele Mthembu, Status: Working On It Now
- 26 Aug 2015 12:58:20 by Zanele Mthembu, Status: Working On It Now

The map shows various suburbs including Krugersdorp, Sandton, Midrand, Tembisa, Roodepoort, Soweto, and Diepsloot. The City of Johannesburg Metropolitan Municipality boundary is also visible.

Overlaid on the map is the Pulse software interface for a service request. The URL is https://support.pulsesoftware.co.za/incident_response/AddUpdateIncident.aspx?nncid=45360. The interface shows the following details:

- Subject: CHANGING DATES ON PULSE
- From: tshepiso@isretail.co.za
- Reporting Date: 23 Jul 2015 14:56:33
- Deadline Date: 26 Aug 2015 17:00
- Reported By: Tshepiso Radebe
- Experienced By: Tshepiso Radebe
- Financial Summary Details: Billable Hrs Amt: R 0.00, Actual hrs Amt: R 385.00, Total Billable: R 0.00, Total Cost: R 385.00, Token Cost: 0, Quoted Hours: 0, Quoted Amount: R 0.00

The interface also includes a message: "I hope you are all doing well! Please assist, We have picked up that certain staff have found a way of adjusting the date thus giving incorrect updates and false info. Is there a way of making sure that the date on the attachment cannot be change or some sort of notification when the date is adjusted."



Built-in editor for HTML email templates

Pulse now includes an HTML editor for your email notification templates. This ensures that the formatting is correct and allows images and signatures to be easily embedded. It will also automatically create the plain text template needed for older email systems.

Edit or Create Template

Create plaintext template using text from HTML

Name

Email Subject

Plain Text: **HTML**

Paragraph Font Family Font Sizes   

B *I* U                    



Dear #REPORTINGUSER#

New Service Request logged, #REFNO#.

Original Description:

#DESCRIPTION#

You can view its details here:
#CONSULTANTINCIDENTURL#

the-i-junction Support-Central Notification agent

Further Information:

Reference Number: #REFNO#
Reporting user: #REPORTINGUSER#
Experiencing User: #EXPERIENCINGUSER#
Assigned Staff member: #ASSIGNEDCONSOLE#
Company: #COMPANYNAME#
Assigned Team: #ASSIGNEDTEAM#
Assigned Team leader: #ASSIGNEDTEAMLEADER#
EmailEvent Description: #EMAILEVENTDESCRIPTION#
Recipient Class Description: #RECIPIENTCLASSDESCRIPTION#
Deadline: #DEADLINEDATE#
Target: #TARGETDATE#



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Replace Fields Images Signatures

Reporting Contact Person
Reporting Contact Person Email
Experiencing Contact Person
Client Liason

Assigned Consultant
Previously Assigned Consultant
Logged by Consultant
Assigned Team
Team Leader

Ticket Ref No
Ticket Title
Ticket Description
Ticket Reporting Date
Ticket Target Date
Ticket Deadline Date
Ticket Status
Customer Reference Number
SLA Name
SLA Percentage Remaining
SLA Time Remaining
Ticket Text Field
Ticket Memo Field
Ticket Currency Field
Ticket Numeric Field
Ticket Category Name
Ticket Category Value

Event Description
Recipient Class Description
Project Name
Client Portal Ticket Link
Client Portal Survey Link
Consultant Ticket Link

Additional Replacefields

p Words: 74

Status scoreboard simplification

Users who are only able to view service requests assigned to them will now only see one column in the left hand Status Scoreboard toolbar.

The screenshot displays a user interface for a service management system. On the left, a dark sidebar contains the 'Status Scoreboard' section. It features a header with the user's name 'Paul Barnfield' and a table with two columns: 'Unaddressed' and 'Totals'. The 'Unaddressed' row shows a count of 5, and the 'Totals' row also shows a count of 5. The word 'Yours' is positioned above the table. On the right, a light-colored main area shows a navigation bar with 'My Home' and 'Setup' tabs. Below this is a section titled 'Assigned to you' which includes a summary of '5 Jobs' and a table with columns for 'Ref No' and 'Reporting Date'. A single row in the table shows the reference number '000062' and the date '12 May 2015 12'.

	Yours
Unaddressed	5
Totals	5

Assigned to you

5 Jobs Page: 1 of 1

Ref No	Reporting Date
000062	12 May 2015 12

Financials



Sales order costing improvements

We have extended the sales order functionality to include per-line and per-frequency totals, as well as margin calculations. The sales order also has a status to indicate whether it is within budget or not.

Delivery Date

Required Date

Financial | Relates To | Customer | Delivery

Discount %

Markup %

Account

Doc. Currency

Setup margin **On budget**

Recurrent margin

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Line	Catalogue Item	Deliver To	Qty	Cost Price	Price	Margin	Amount	VAT Amount	Change Serial	Active
1	6 Static Ips	/Travelodge/Travelodge (TRA001-IE1009) (Limerick, Dublin Rd) Bob	1	0.60	0.86	30.23%		0.17		Go Live: 28 Aug 2015 <input type="checkbox"/> Active (Y/N)
2	ADSL Business FTTC (Ent	/Travelodge/Travelodge (TRA001-IE1009) (Limerick, Dublin Rd) Bob	1	60.00	100.00	40%		20.00		Go Live: 28 Aug 2015 <input type="checkbox"/> Active (Y/N)
3	Cisco IP Phone	/Travelodge/Travelodge (TRA001-IE1009) (Limerick, Dublin Rd) Bob	1	65.00	130.00	50%		26.00		<input type="checkbox"/>
				Monthly	125.6	230.86	45.65%	230	46	
				Setup	0.6	0.86	45.48%	0.86	0.17	

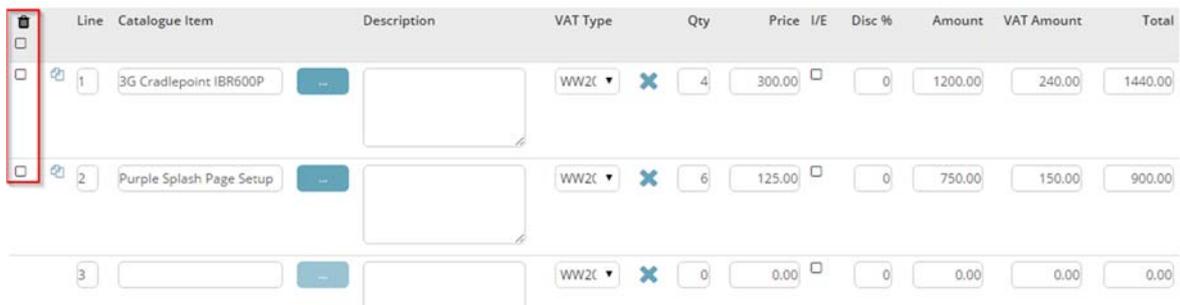
Quote workflow improvements

Version 15.08 has improved workflow in quotes so that the following rules are applied:

- You can only make an invoice from a quote after it is approved, sent and accepted
- You cannot make an invoice from a rejected quote
- You cannot make any further invoices if the quote is fully invoiced
- Quotes that are fully invoiced are automatically marked as such

Purchase order multiline delete

Line items can now be selected in bulk for deletion. This is especially useful when the purchase order is made off another document, such as a sales order.



Line	Catalogue Item	Description	VAT Type	Qty	Price	I/E	Disc %	Amount	VAT Amount	Total
<input type="checkbox"/>	1	3G Cradlepoint IBR600P	WW2C	4	300.00		0	1200.00	240.00	1440.00
<input type="checkbox"/>	2	Purple Splash Page Setup	WW2C	6	125.00		0	750.00	150.00	900.00
<input type="checkbox"/>	3		WW2C	0	0.00		0	0.00	0.00	0.00

Back end financial enhancements

Pulse financials now include automated year-end rollover journals and new transactional roll-ups. These make reporting and year end faster and easier than ever before.

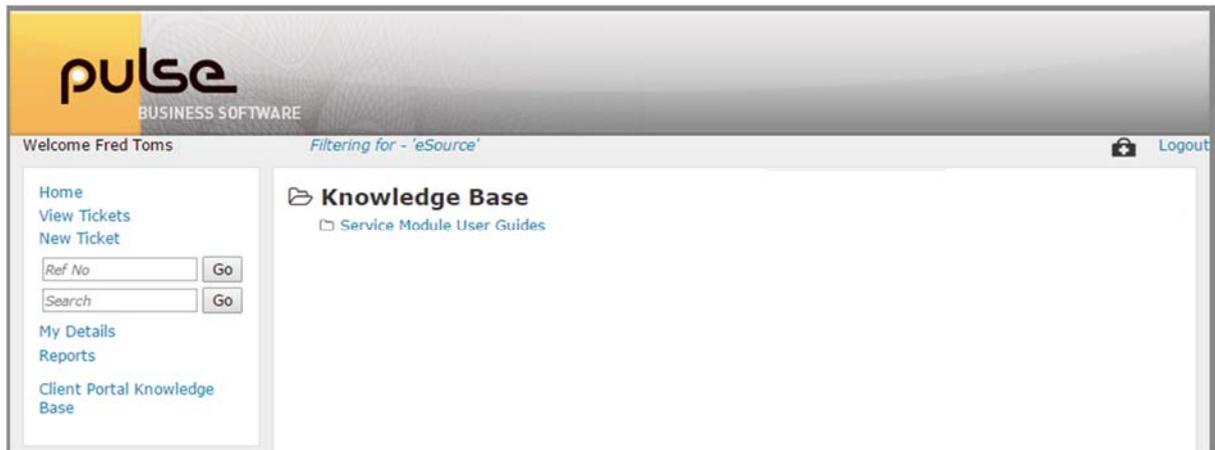
Client Portal



Client portal knowledge base / document repository

The Pulse client portal is now able to host a document repository. You are in complete control of the folder structure, and all major document types (including audio and video) are supported.

This is disabled by default to prevent your customers seeing an empty knowledge base, so please let us know if you would like to use it.



Core



Improved remote monitoring of your Pulse system

Along with the continual incremental improvements in user interfaces and stability, version 15.08 brings improved remote monitoring of your Pulse installation so that we can respond to problems more quickly.