



# Pulse Release Notes – 15.11

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## Watershed Items

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

### Service

-  Linking related Service Requests together for reporting and service delivery
-  Emails and attachments available directly on the main Service Request interface
-  Various SMS notification improvements
-  Client sign off/one-time pins available directly on surveys

### Projects

-  Project budgets now include linked Service Requests in their calculations

### Client Portal

-  Allow contract selection by your customers when logging a Service Request

### Core

-  Password expiry customisable, and can be turned off entirely

## Service



### Linking related Service Requests together for reporting and service delivery

Multiple Service Requests are sometimes related to the same delivery of work without needing to interact in terms of workflow. Projects and parent/child relationships may be more than is required. Service Request groups fill this gap, allowing you to group two or more Service Requests together.

The screenshot displays the Pulse software interface. A 'View Group' dialog box is open, showing a 'Software update issue' with the description 'It looks like a software update has broken some installations'. The dialog prompts the user to 'Enter the Ref No to link the Job.' and includes a 'Select' button. Below this, a table lists 'Linked Jobs' with two entries: '000388' and '000389', each with a trash icon for removal.

Linked Jobs	
000388	
000389	



## Emails and attachments available directly on the main Service Request interface

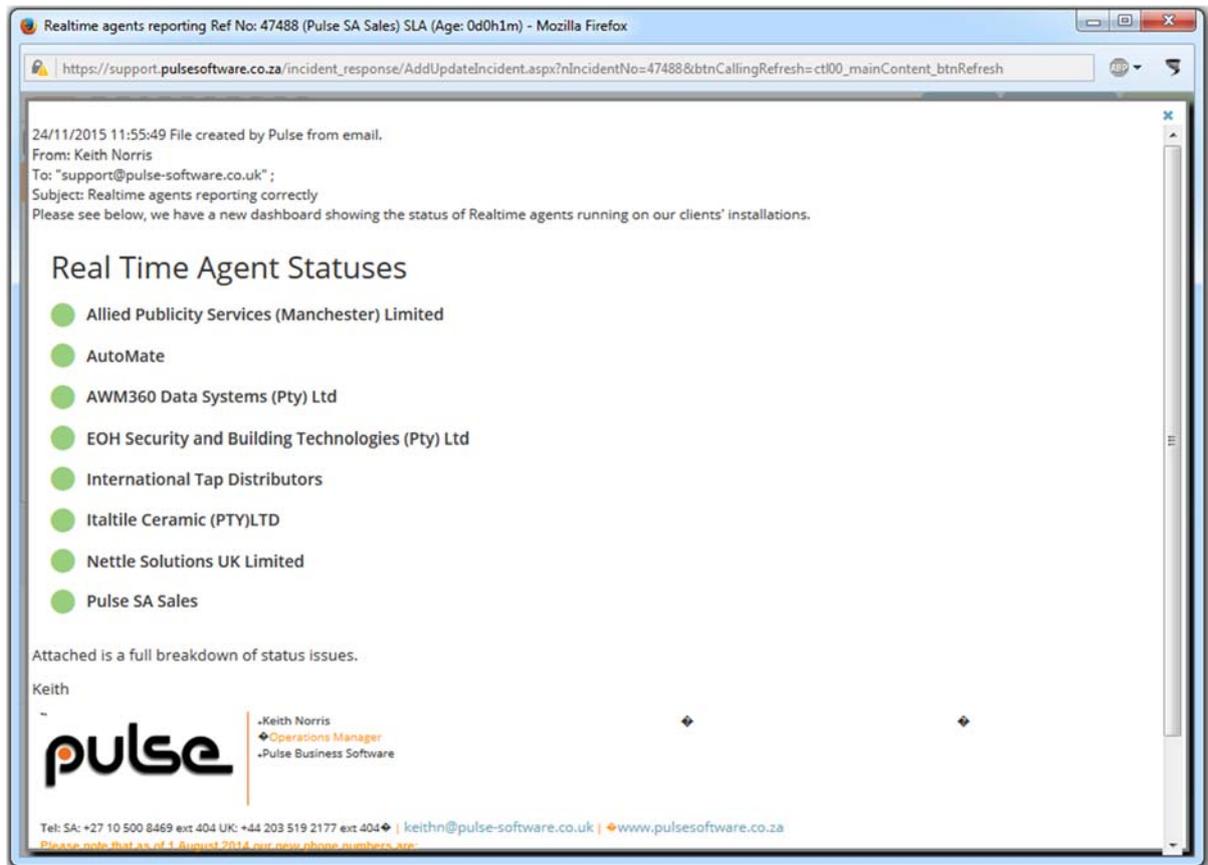
Pulse has always attached emails and their attachments to the Service Request and made them available on the attachments tab. This improvement now displays them next to the Response they apply to and if the Service Request was generated from an email, it is available next to the title.

The screenshot displays the Pulse software interface for a service request. The top navigation bar includes 'Unaddressed', 'Team Pulse Staff', 'Consultant Triage Queue (1)', and 'Attachments (2)'. The main content area shows the service request details, including the subject 'Realtime agents reporting correctly', the reporting date '24 Nov 2015', and the reporter 'Keith Norris'. The response section shows a response from Keith Norris on 24 Nov 2015 at 11:57:46, with the subject 'Realtime agents reporting correctly'. The response content includes the text 'Please see below, we have a new dashboard showing the status of Realtime agents running on our clients' installations.' and an attachment '[image: Inline image 1]'. The response is marked as 'Approved' and has a rate of 500. The bottom section shows a table of responses with columns for Date, Who, Description, Act Hrs, Km, Response Type, and Rate.

Date	Who	Description	Act Hrs	Km	Response Type	Rate
24 Nov 2015 11:57:46	Keith Norris	[Empty]	00h00	0	Update	500
24 Nov 2015 11:55:49	Keith Norris	Subject: Realtime agents reporting correctly From: keithn@pulse-software.co.uk Please see below, we have a new dashboard showing the status of Realtime agents running on our clients' installations. [image: Inline image 1]	00h00	0		0

Continued...

Opening the associated email displays the rich text formatted email directly inside the Service Request window.



Please note that this will only apply to emails received by Pulse after being upgraded to version 15.11 or greater.



### Various SMS notification improvements

We have done away with email-to-SMS support and replaced it with a more powerful API-based approach. This means that we can now record and display whether the SMS was successfully sent. We have improved the mobile number fields making it easier to capture phone numbers correctly, using a flag dropdown to designate the country code.

#### Add/Update Contact Person Details

Title	<input type="text" value="Mr"/>		
FirstName	<input type="text" value="Jacques"/>	Surname	<input type="text" value="Kallis"/>
ID Number	<input type="text"/>	Birth Date	<input type="text" value=""/>
Telephone	<input type="text" value="0123 4564 875"/>	Mobile Number	<input type="text" value="0371 719 6712"/> <span>✓ Valid</span>
Email	<input type="text" value="JKallis@small.net"/>		



### Client sign off/one-time pins available directly on surveys

Surveys can now directly incorporate the client sign off/one-time pin functionality. This makes it much easier to show the customer what they are signing off, and the fact that they have done so is included in the survey data. It is available as a new question type on incident-based surveys.

Fire extinguisher requires servicing  Yes  No

Fire extinguisher service is booked  Yes  No

Technician completed the survey on the premises. Recipient

Name

EMAIL  SMS

Address/Number

Client Sign-Off

### No default text in emails sent from your email program off the Service Request

It is now possible to not have default text in the body of an email sent from the Service Request when using your email program. Let us know if you would like to turn the default text off.

test Ref No: 000387 (Test) SLA (Age: 0d1h35m) - Google Chrome

https://demo.pulse-software.co.uk/incident\_response/AddUpda

000387 No SLA (Age: 01h35m)

Acknowledged Team 3rd Line Consultant Admin Admin (11) [At W

Details Systems Project Checklists Relates To Contract Schedule Clie

Cisco Router Setup \*Reporting Date 24 Nov 201!

IP: 10.1.35.67 \*Deadline

Name: Cisco Boardroom

Location: Boardroom

Firewall: Yes

Serial Number: X1-9789-12323-3-22v

Reporting User Sam Fillis

Experiencing User Sam Fillis

Financial Summary Details

Billable Hrs 00h00 Hour

Billable Hrs £ 0.00 Actui

Amt

Open email program with no body text

### Prevent Service Request description editing

Do you include important information in the description of the Service Request only to find that it is edited and overwritten by a staff member? The ability to edit the description can now be controlled by clearance level. Let us know if you would like to implement this in your installation.

The screenshot shows a web browser window with the following details:

- Browser: Google Chrome
- URL: [https://demo.pulse-software.co.uk/incident\\_response/AddUpdate](https://demo.pulse-software.co.uk/incident_response/AddUpdate)
- Incident ID: 000387
- Status: Acknowledged
- Team: 3rd Line
- Role: Consultant
- Admin: Admin Admin (11) [At V...]
- SLA: No SLA (Age: 01h35m)

The main content area is titled "Details" and contains the following information:

**Cisco Router Setup**

IP: 10.1.35.67  
Name: Cisco Boardroom  
Location: Boardroom  
Firewall: Yes  
Serial Number: X1-9789-12323-3-22v

**Locked for non-technical staff**

Additional fields on the right side of the interface:

- \*Reporting Date: 24 Nov 201...
- \*Deadline: [Empty field]
- Reporting User: Sam Fillis
- Experiencing User: Sam Fillis
- Financial Summary Details [Link]
- Billable Hrs: 00h00 Hour
- Billable Hrs: £ 0.00 Actu.
- Amt: [Empty field]

## Miscellaneous Charges improvements

The Miscellaneous Charges tab on the Service Request has been enhanced to include centralised statuses and suppliers. It is also possible to customise much of the default text for your use.

Description	Status	Qty	Cost	Price	Amount	Supplier
Power supply 23423	Will supplier	1	20	400	400	beyon
Motor	In store	1	30	15.08 (Test) - (Beyonce Knowles)		
		0	0	0	0	

Date	Who	Description	Act Hrs	Doc No
24 Nov 2015 10:41:13	Admin Admin		00h00	
02 Sep 2015 11:47:33	Admin Admin		00h00	
25 Aug 2015 11:00:27	Admin Admin	-- Job Logged -- ; Chargeable set to Chargeable; Appliance Type set to Electrical; Call Type set to Recall; Priority set to Priority 1; Experiencing Contact set to Joe Friedman; Assigned Team Member set to	00h00	

## Bulk move of Contact People

Do you often need to move contact people from one client to another? The new spreadsheet import to facilitate this allows you to set whether the contact person should become the default at the client, and if so can be reset as the reporting and experiencing user at that client.

Choose an existing File: Template Contact Person Move (BLANK) (1) ABC.xls

It is strongly recommended that you import data to your test site first, as mistakes are difficult to rectify later

- Download Template for Contact Person Import.
- The import uses the FromAccountNo column to find the current Client, and the ToAccountNo column to find the client to move to.
- It then uses NationalID, Email, and finally first name & surname to find a matching contact person at the current client.
- If DefaultForIncidents is 1 or True then this contact will be made the default at the new client. If there is an existing default they will no longer be the default.
- If DefaultForIncidents is 1 or True and MoveExistingIncidentsFromCurrentDefault is 1 or True then all open incidents assigned to the current default will be moved to this contact.
- Do not alter the number or name or order of columns in the template.

### Import Preview

[Load File](#) [Show All Pages](#)

File Loaded: Template Contact Person Move (BLANK) (1) ABC.xls

FromAccountNo	ToAccountNo	FirstName	Surname	IDNumber	Email	DefaultForIncidents	MoveExistingIncidentsFromCurrentDefault
ABC001	PRAX001	Gary	Player	45023695857452	GaryP@abc.biz	False	N/A

[Import](#)

# Projects



## Project budgets now include linked Service Requests in their calculations

Service Requests linked to a Project after creation are now included in budget calculations for actual hours and count towards incurred manpower expenses.

Budget Name [Pulse Implementation] Start Period Aug 2015  
 Currency [Rand] Exchange Rate [1]

### Budget Forecast Details

Project Budget [Pulse Implementation] Version 1  
 Project Currency Rand  
 Rate for forecast 1

Section	Account Type	Forecast	Billable Tasks	Sub-Projects Forecast	Finished Billable Tasks	Invoiced	Billable Balance
Income	INCOME	44000.00	44000.00	0.00	44000.00	22000.00	22000.00
Total Sales	R	44000.00			44000.00	22000.00	22000.00

Section	Account Type	Forecast	Sub-Projects Forecast	PO's	Actual	Accrual
Expense	EXPENSE	1500.00	0.00	0.00	0.00	0.00
Total Expenses		R 1500.00		0.00	0.00	
Gross Profit (Financials Only)		R 42500.00		44000.00	22000.00	

Professional Services	Forecast	Sub-Projects Forecast	Total of Tasks	Work Done	
Hours	75.00	0.00	0.00	37.86	
Average Rate	550.00	0.00	200.00	0.00	
Value	41250.00	0.00	0.00	0.00	
Total Labour		R 41250.00		0.00	0.00
Gross Profit (Including Labour)		R 1250.00		44000.00	22000.00

	Forecast	Sub-Projects Forecast	Ordered/In Progress	Invoiced/Actual
Margin %	2.84 %	0	100 %	100 %
Profit R	1250.00	0	44000.00	22000.00

Traffic Light Indicators	Red Light at	Amber Light at
Margin %	0 %	0 %



## Financials

### New Supplier Document Date field on Supplier Invoices and Credit Note

If you need to post a supplier invoice or credit note but the period of the document is closed, then you can indicate the date in a new field.

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## Main Supplier - SUP0001 / Supplier In

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Client Details ▾ Sales ▾ Inventory ▾ **Supplier Financials ▾**

### Supplier Invoice - Main Supplier

Document Number

Document Date

**Supplier Document Date**

Subject

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## Client Portal



### Allow contract selection by your customers when logging a Service Request

If you offer different services recorded as contracts in Pulse, these can be offered for selection in the Client Portal when logging a new Service Request. If the customer only has one such contract, it will be preselected. Please contact us if you would like to display contracts for selection to your customers.

The screenshot shows a web application interface for logging a service request. The top navigation bar includes 'Welcome Gary Player', 'Filtering for - 'ABC Consulting Group'', and a 'Logout' link. On the left, there is a 'CLIENT SEARCH' sidebar with a search box, a checked 'Include Children' option, and radio buttons for 'All' and 'Mine'. Below this are links for 'Home', 'View Jobs', and 'New Job', along with search boxes for 'Ref No' and 'Search'. The main form area contains the following fields:

- Reporting User:** Gary Player
- Experiencing User:** Gary Player (dropdown)
- Title:** Our phones are not working
- Description of Job:** This has been since about an hour ago. Please check what is wrong with our switchboard
- Contract:** A dropdown menu is open, showing options: '- Select -', '- Select -', '00001 - Maintenance Agreement', and '00002 - South East maintenance'. A 'Choose File' button and 'No file d' text are also visible.
- Severity:** - Select - (dropdown)
- Customer Reference:** (empty text box)

There are 'Save' buttons in the top right and bottom right corners of the form area.

## Core



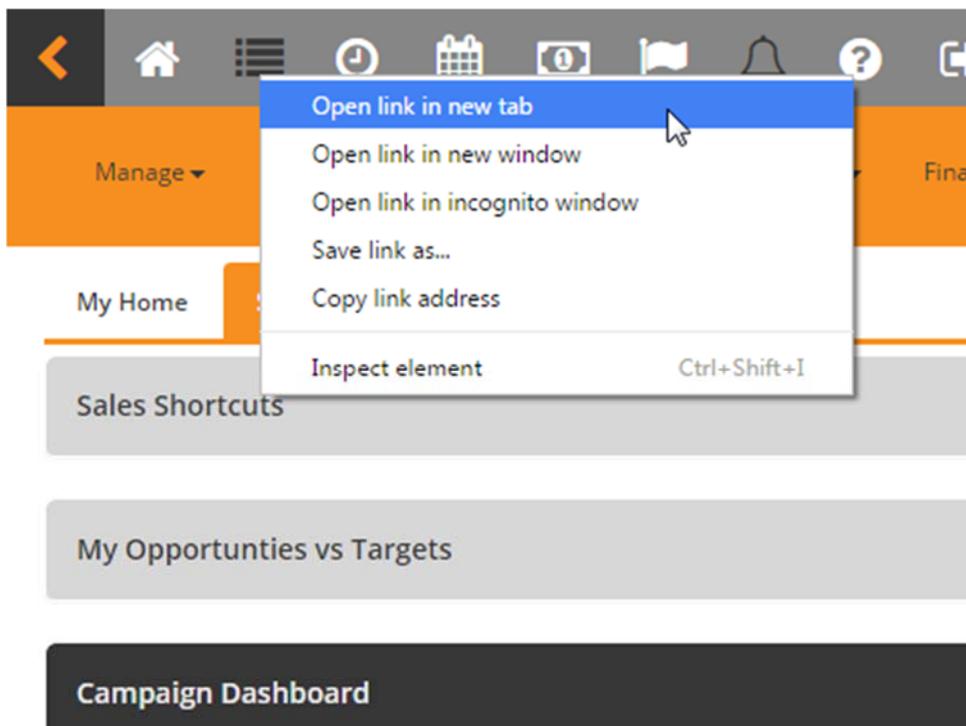
### Password expiry customisable, and can be turned off entirely

As the world changes so do security threats and our responses to them. With so many passwords needed for modern life, it is now safer to choose long complex passwords, meaning it is no longer necessary to change them as often.

Up to version 15.08, Pulse mandated password changes every 30 days. Please let us know if you would like this made longer (or shorter), or if you would like password expiry turned off completely.

### Open menu items in a new tab

With the reskinning exercise we undertook earlier this year, it was no longer possible to right-click on menu items and icons to open them in a new tab. We have brought this back in 15.11.



### General background improvements

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

We have also included more monitoring of your installation and tools that will help our staff deliver better service to you.