Pulse Release Notes – 16.05

Watershed Items

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

Service

- Mobile interface reskinned to match main application
- Travel time added to appointments, with Travelling Now buttons on the mobile appointment interface
- Client handwritten signature sign off now available on mobile interface
- Ability to remove parent setting from a Service Request
- New compact Quotation interface
- Email that logged Service Requests available on lists
- Client Service Requests lists now able to show Service Requests at client's children and further descendants

Inventory

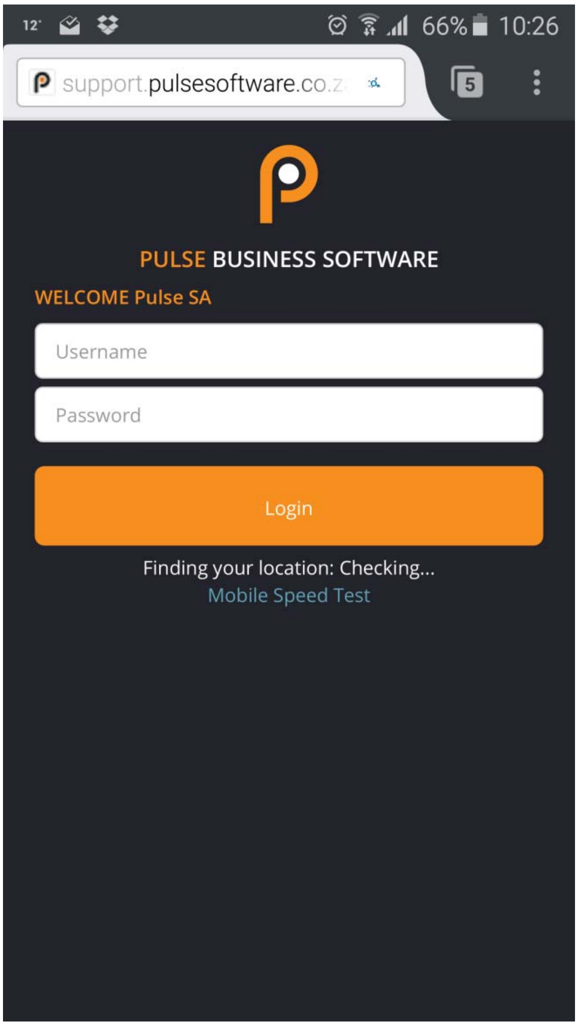
- Generate and print barcodes for serialised inventory items

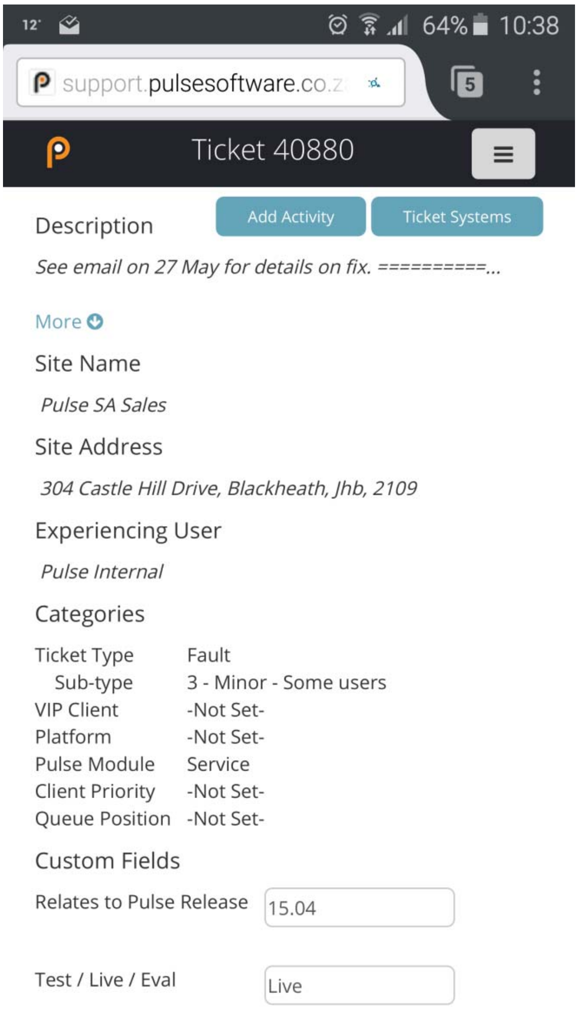
Core

- Collapsing menu bar to improve available vertical space

Service

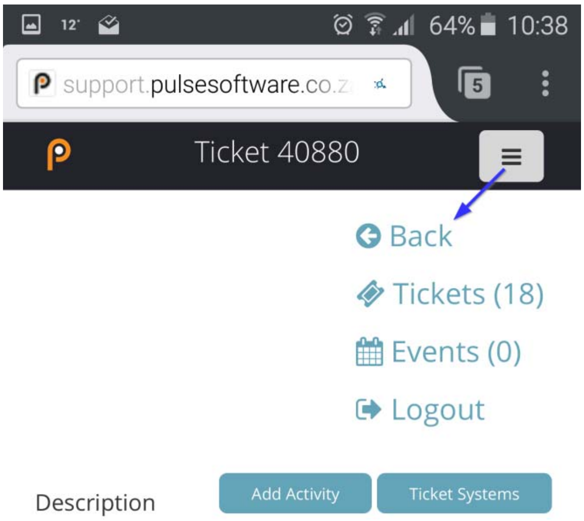
Mobile interface reskinned to match main application
Building on the success and positive feedback from the reskinning of the desktop application, we have applied the same skin to the mobile browser interface. The experience across mobile and desktop for service users is now more consistent and easier to use.





The design is responsive to fit any device, and will handle portrait and landscape layouts. Please note – some interfaces are easier to use in landscape mode, so flip your device to try it out.

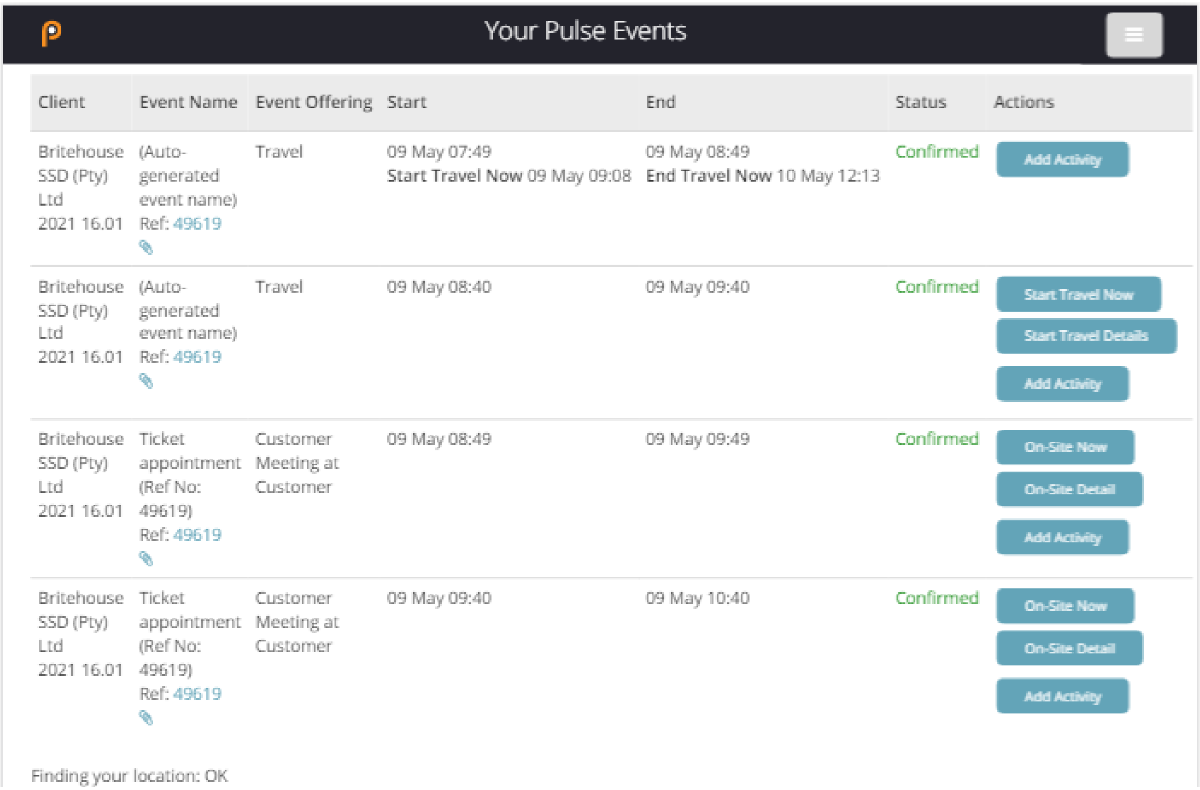
Navigation is context aware and accessed through the navigation icon.



To try out the mobile site point your browser at [yourpulseurl]/mobile. We support all major mobile browsers on tablets and phones.

Travel time added to appointments, with Travelling Now buttons on the mobile appointment interface

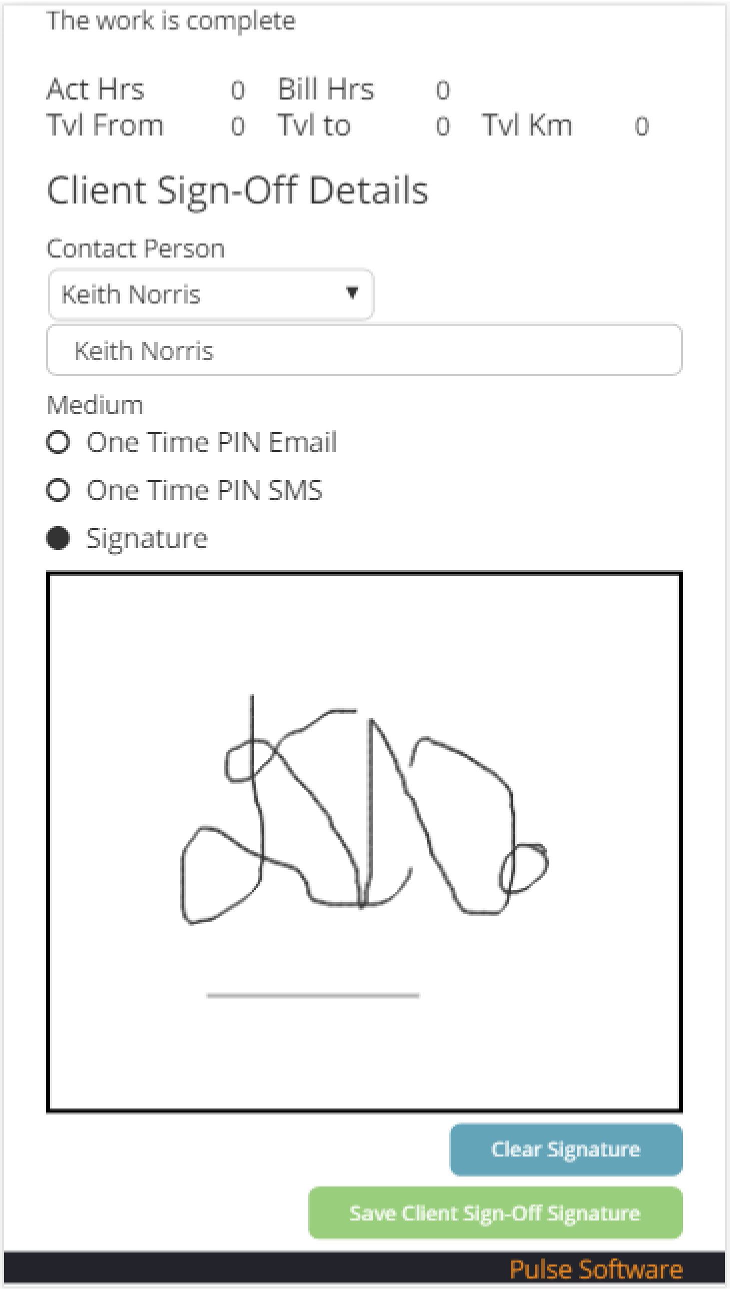
Pulse appointments can make travel time appointments automatically, which appear in the mobile interface with the ability to mark them as "Start Travel Now" and "End Travel Now". Contact us if you are interested in using travel appointments so that we can set them up for you.



Client	Event Name	Event Offering	Start	End	Status	Actions
Britehouse SSD (Pty) Ltd 2021 16.01	(Auto-generated event name) Ref: 49619	Travel	09 May 07:49 Start Travel Now 09 May 09:08	09 May 08:49 End Travel Now 10 May 12:13	Confirmed	Add Activity
Britehouse SSD (Pty) Ltd 2021 16.01	(Auto-generated event name) Ref: 49619	Travel	09 May 08:40	09 May 09:40	Confirmed	Start Travel Now Start Travel Details Add Activity
Britehouse SSD (Pty) Ltd 2021 16.01	Ticket appointment (Ref No: 49619) Ref: 49619	Customer Meeting at Customer	09 May 08:49	09 May 09:49	Confirmed	On-Site Now On-Site Detail Add Activity
Britehouse SSD (Pty) Ltd 2021 16.01	Ticket appointment (Ref No: 49619) Ref: 49619	Customer Meeting at Customer	09 May 09:40	09 May 10:40	Confirmed	On-Site Now On-Site Detail Add Activity

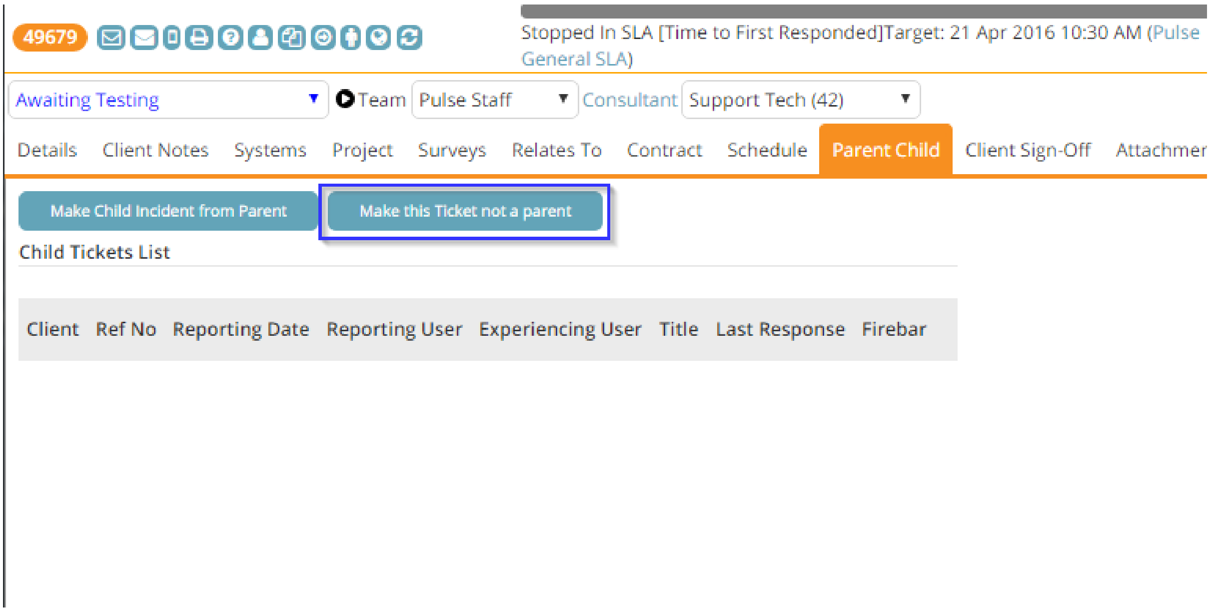
Client handwritten signature sign off now available on mobile interface

It is often important for technicians on the road to receive confirmation that the work is complete before they are allowed to leave the site. We are very excited to announce that handwritten signatures can now be captured on any touchscreen device running the mobile site in any browser. One-time pin emails and SMSs are still supported, and all sign offs are available on the Service Request and verifiable.



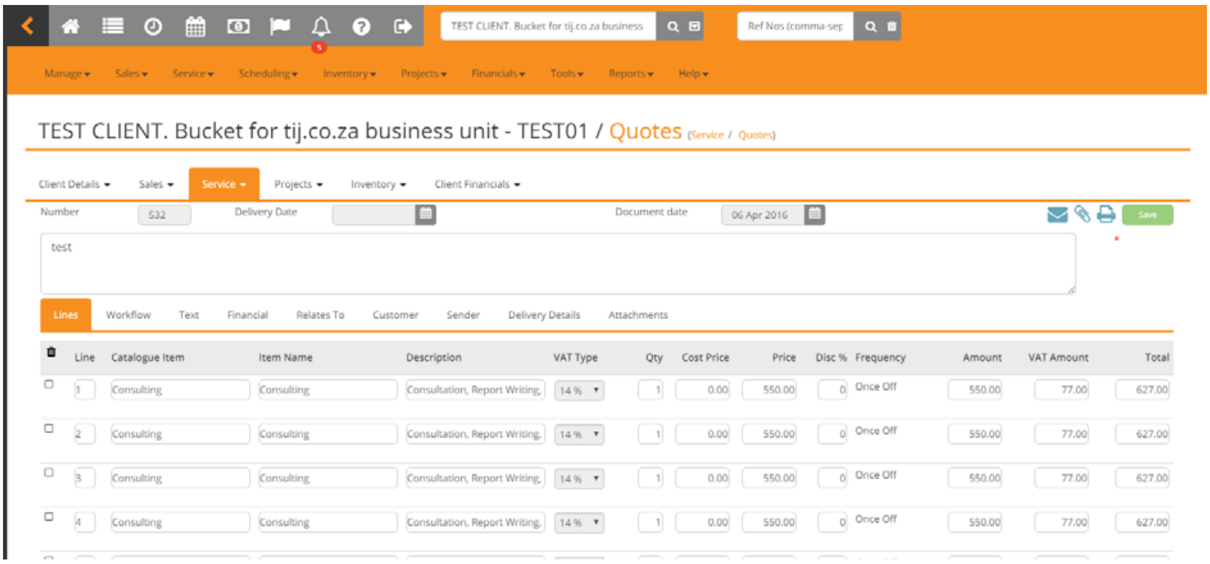
Ability to remove parent setting from a Service Request

When you have multiple clients affected by a single event, such as a server going offline, a parent Service Request against the server can control updates of all child Service Requests. In this way, work done on the parent filters to the children to keep your call centre and customers up to date on progress. New functionality now makes it possible to unset the parent setting in case it was set in error.



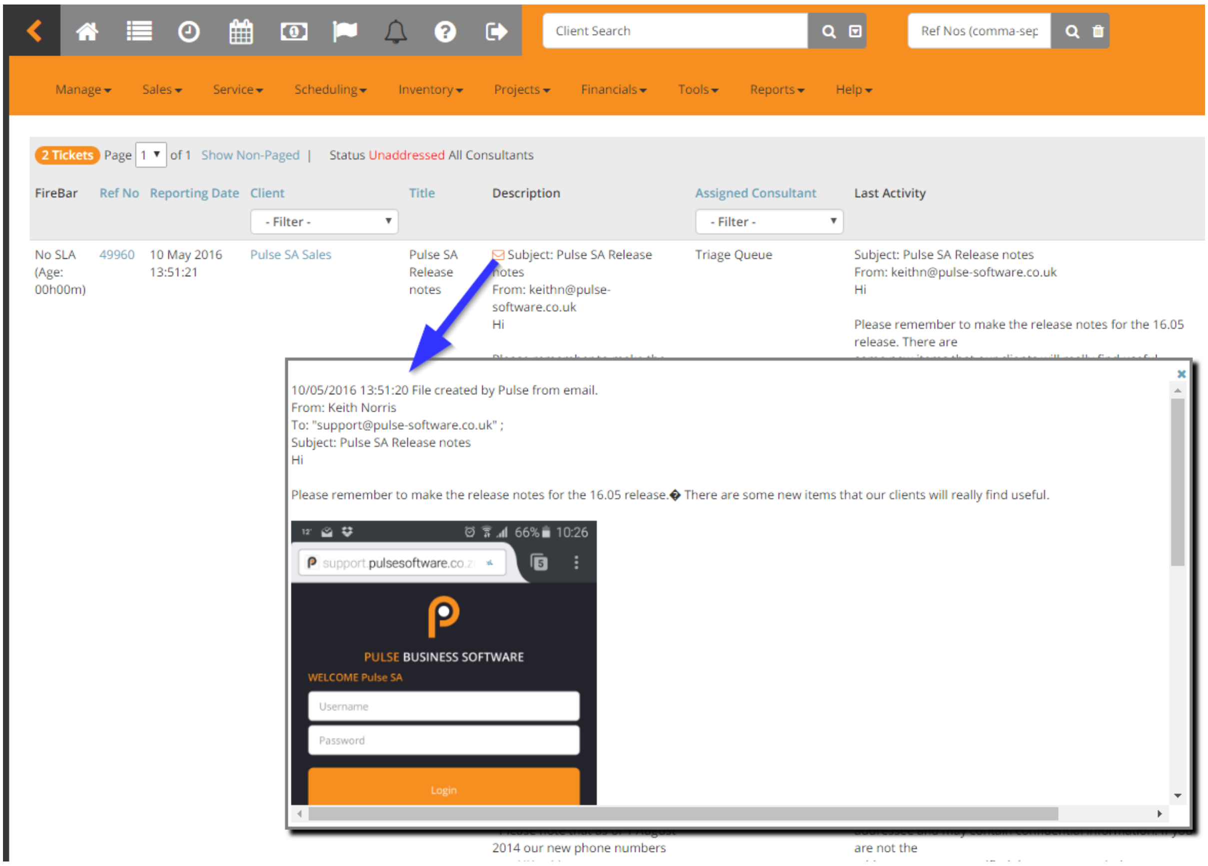
New compact Quotation interface

Financial documents carry a lot of information. This can include a subject, a variety of dates, workflow, delivery details and more. At the end of the day, however, the most important section is the line items, which tend to be found at the bottom of the document. In version 16.05 we have redesigned the quote to reflect the importance of the line items – they are always visible, but the extra information can be collapsed so that the line items are central to your view.



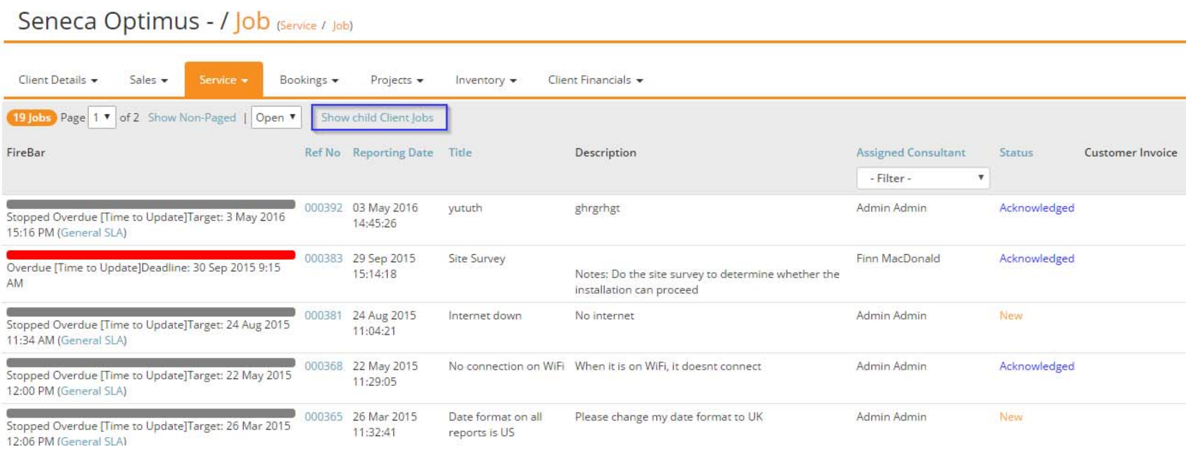
Service Requests logged by Email available on lists

One of the most popular features we have introduced recently was the ability to view emails on the main Service Request interface. Building on this, we have made them available on the lists of Service Requests you find in Pulse.



Client Service Requests lists now able to show Service Requests at client's children and further descendants

When viewing Service Requests on a client, it is often useful to view those at child clients. A single click now makes this possible.



Link to the Response from the Appointment on the mobile interface

It is now possible to get to the Response adding interface directly from the Appointment.

Replace labels for mobile appointments

Mobile appointment buttons, such as "Left Site" can have alternative text if required. Contact us for more information if this is useful to you.

Financials

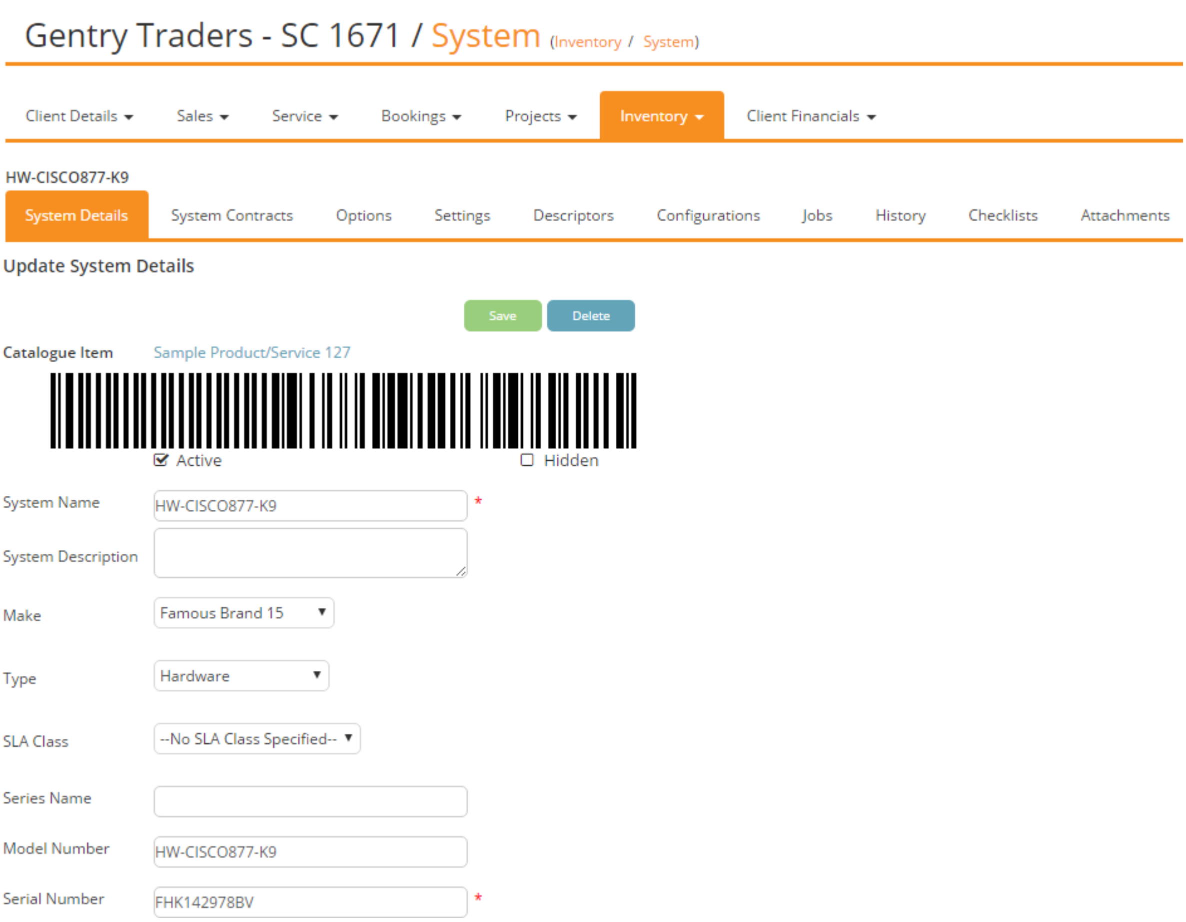
Attachments on Debtors Invoices
Debtors Invoices join the growing list of documents that can have attachments.

Inventory

Generate and Print Barcodes for Serialised Inventory Items

Pulse Inventory has received a major update with the introduction of internal barcodes. Your warehouse can now receive, process, move and pick stock, all the while using barcodes generated internally. Cost-effective barcode scanners can be used to record all stock, as well as its location.

Barcodes can be printed to put onto stock items, and can be included on any documents printed, such as picking slips, invoices, etc.



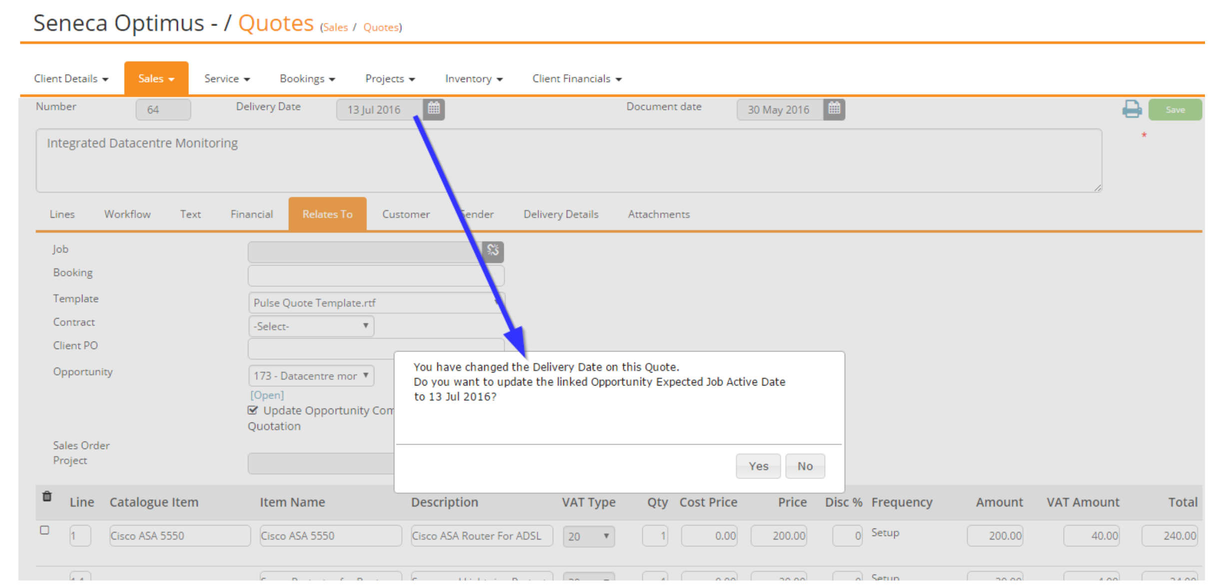
Attachments on Systems

Systems are added to the growing list of items that support attachments.

Sales

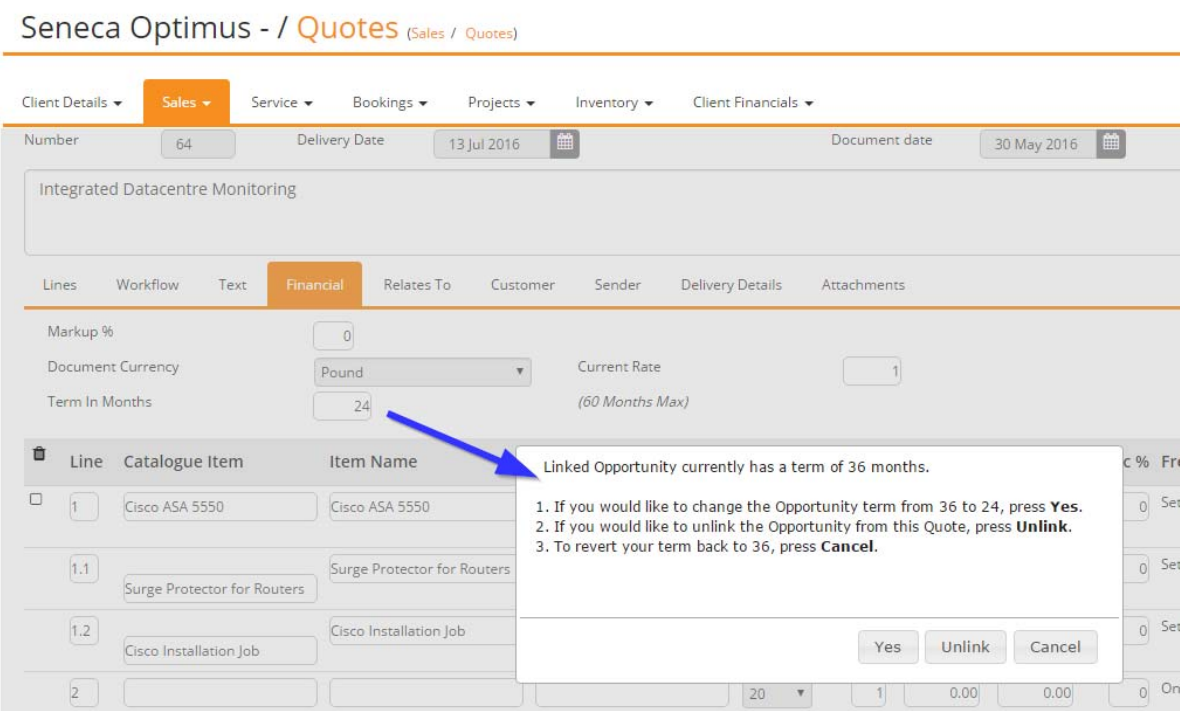
Changing the delivery date on an Opportunity linked Quote prompts an update on the Service Active Date

Pulse's powerful Opportunity – Quote interlinkage means that you do not have to capture details twice during the sales and scoping process. This has received a boost as the delivery date on the Quote is linked to the Expected Job Active Date on the Opportunity, making your sales reporting more accurate than ever before.



Improvements to changing the term on a Quote linked to an Opportunity

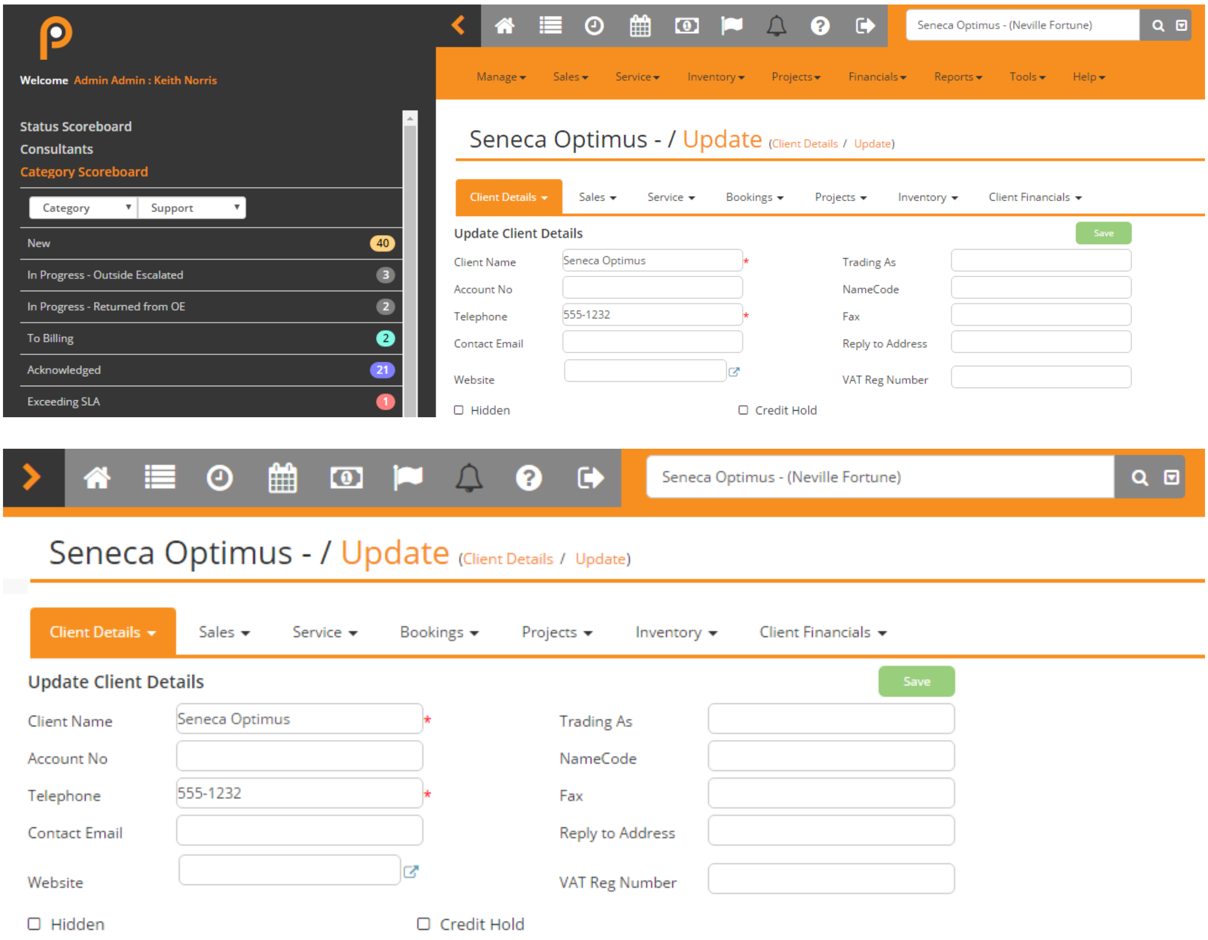
Further to the date interactions above, changing the term on the Quote gives more options for the corresponding field on the Opportunity.



Core

Collapsing Menu Bar to Improve Available Vertical Space

Collapsing the left toolbar is a great way to get more space to work with, especially on documents such as quotes, which can have many columns on the line items. From version 16.05 you will also benefit from increased vertical space as the menu bar collapses along with the left toolbar. To get it back, simply reopen the left toolbar.



Hiding a Consultant Ensures that they are Not the Default

Consultants can be set as defaults for a variety of items in Pulse. When a staff member leaves, it can be difficult to ensure that hiding their consultant record does not leave you without a default. We have therefore built in an alert that will tell you what items need addressing before you can hide the consultant.

Link to the Client Portal from the Main Application Login Screen

Sometimes your customers will browse to [https://[YourPulseSite]](https://[YourPulseSite]) instead of [https://[YourPulseSite]/ClientPortal](https://[YourPulseSite]/ClientPortal). To help them find their way we have added a link to your Client Portal on the main login screen.

General Consistency Improvements

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